Onboarding and EPAF Manual for Temporary/ Non-Benefitted Employees

The very thorough manual about submitting a MasonOnBoard packet, querying or creating a SPAIDEN record, and submitting an EPAF.

Alternative title: The long-winded story about how to submit an EPAF.

For optimal functionality*, please use Internet Explorer.

*Optimal functionality for viewing this document, of course, because "optimal functionality" and "Internet Explorer" would otherwise not be used in a sentence together.
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Introduction

What are EPAFs?
Electronic Approval Actions Forms (EPAFs) are the way colleges, units, and departments submit temporary, non-benefitted assignments for employees. Temporary assignments include Non-student wage, Student wage, Work study, Adjunct, Graduate Assistant, Resident Assistant, and Miscellaneous assignments.

What is MasonOnBoard?
MasonOnBoard (masononboard.gmu.edu) is the system of record for hiring paperwork for all employees. A MasonOnBoard packet needs to be submitted by the EPAF Submitter for all new non-benefitted employees ie. employees whose jobs are submitted via EPAF.

A MasonOnBoard packet will be submitted by Central HR for all benefitted employees, so the department should not submit a packet for these types of employees.

Getting Access
EPAF approvers and submitters must attend an EPAF training and submit a Banner Administrative Systems Accounts Request to get access to the HR system. EPAF training is generally held every other week. The request form will be given at training and can also be accessed through Patriotweb. Please sign up for training at http://hr.gmu.edu/learning/. EPAF submitters must also take an EPAF refresher course, each year, to maintain access. The refresher course can be accessed through https://typhon.gmu.edu/HR/mymasonhr/.

MasonOnBoard access is granted to employees that attend both EPAF training and MasonOnBoard training. Once you have attended EPAF training, you will be invited to MasonOnBoard training to get access to submit hiring packets.

Data Security
Please review carefully the confidentiality agreement on the Banner Administrative System Accounts Request form when signing and submitting the form. In addition to reviewing this agreement, please note specifically that Social Security Numbers should never be emailed, sensitive information should never be saved on your computer’s hard drive (you may save this on your department’s shared drive or under mydata), and EPAFs should never be submitted for oneself.

Data Standards
Information in Banner must be formatted in specific ways. Please refer to the Data Standards Document to ensure proper formatting of names, titles, etc.

Banner Navigation
You can log-in to Banner from https://patriotweb.gmu.edu/admin/. Type your Mason User ID and password. The password is the same as your email password. Please note that information in Banner auto-populates with the last person for which you were making entries, so be sure you are updating information and submitting assignments for the appropriate person.
<table>
<thead>
<tr>
<th>Banner 8 Icon</th>
<th>Banner 8 Keyboard</th>
<th>Banner 8 Menu</th>
<th>Explanation</th>
<th>Banner 9 Icon</th>
<th>Banner 9 Keyboard</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Save (F10)</td>
<td>File, Save</td>
<td>Saves all changes made in a form since the last time you saved. Banner also refers to save as Commit in some messages.</td>
<td>SAVE</td>
<td>Save (F10)</td>
</tr>
<tr>
<td>Rollback</td>
<td>Rollback (Shift+F7)</td>
<td>File, Rollback</td>
<td>Clears all information and returns you to the Key Block of a form.</td>
<td>Start Over</td>
<td>Rollback/Refresh (F5)</td>
</tr>
<tr>
<td>Select</td>
<td>Shift+F3</td>
<td>File, Select</td>
<td>Enters the highlighted value into the current field of the form you are working from. List of values uses OK as the select.</td>
<td>SELECT</td>
<td>Insert (F6)</td>
</tr>
<tr>
<td>Insert Record</td>
<td>F6</td>
<td>Record, Insert</td>
<td>Inserts a new blank record into a group of existing records.</td>
<td>Insert Record (F6)</td>
<td></td>
</tr>
<tr>
<td>Remove Record</td>
<td>Shift+F6</td>
<td>Record, Remove</td>
<td>Removes all information for the record. When you Save, the record will be deleted from the database.</td>
<td>Delete</td>
<td>Remove Record (SHIFT+F6)</td>
</tr>
<tr>
<td>Previous Record</td>
<td>Up Arrow</td>
<td>Record, Previous</td>
<td>Moves the cursor to the first enterable field in the previous record.</td>
<td>Previous Record (UP ARROW)</td>
<td></td>
</tr>
<tr>
<td>Next Record</td>
<td>Down Arrow</td>
<td>Record, Next</td>
<td>Moves the cursor to the next enterable field in the next record. If the cursor is at the last record, a new record is created.</td>
<td>Next Record (DOWN ARROW)</td>
<td></td>
</tr>
<tr>
<td>Previous Block</td>
<td>Ctrl+Pg Up</td>
<td>Block, Previous</td>
<td>Moves the cursor to the previous information block in a form.</td>
<td>Previous Block/Section (ALT+PG UP)</td>
<td></td>
</tr>
<tr>
<td>Next Block</td>
<td>Ctrl+Pg Down</td>
<td>Block, Next</td>
<td>Moves the cursor to the next information block in a form. If the next block is in another window of the form, that window will be opened.</td>
<td>Next Block/Section (ALT+PG DOWN)</td>
<td></td>
</tr>
<tr>
<td>Enter Query</td>
<td>F7</td>
<td>Query, Enter</td>
<td>Puts the form into query mode and lets you enter search criteria to see what information is already in the database.</td>
<td>Filter Again</td>
<td>Enter Query/Filter (F7)</td>
</tr>
<tr>
<td>Execute</td>
<td>F8</td>
<td>Query, Execute</td>
<td>In query mode, searches the database and displays any records that match the search criteria.</td>
<td></td>
<td>Execute Query/Filter (F8)</td>
</tr>
<tr>
<td>Banner 8 Icon</td>
<td>Banner 8 Keyboard</td>
<td>Banner 8 Menu</td>
<td>Explanation</td>
<td>Banner 9 Icon</td>
<td>Banner 9 Keyboard</td>
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</tr>
<tr>
<td>Cancel</td>
<td>Ctrl+Q</td>
<td>Query, Cancel</td>
<td>Cancels a query and takes a form out of query mode.</td>
<td>CANCEL</td>
<td>Cancel (CTRL+Q)</td>
</tr>
<tr>
<td>View/Send</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Message</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print</td>
<td>Shift+F8</td>
<td>File, Print</td>
<td>Captures the active screen (only what you can see) and prints it to your local printer.</td>
<td>TOOLS</td>
<td>Print (CTRL+P)</td>
</tr>
<tr>
<td>Online Help</td>
<td>F1</td>
<td>Help, Online</td>
<td>Displays the Help window for the current field</td>
<td>Help</td>
<td>Help (CTRL+SHIFT+L)</td>
</tr>
<tr>
<td>Exit</td>
<td>Ctrl+Q</td>
<td>File, Exit</td>
<td>In a menu, the Exit command takes you out of Banner. In a form, the Exit command takes you out of the form. In a query mode, the Exit command cancels the query.</td>
<td>Exit</td>
<td>Exit (CTRL+Q)</td>
</tr>
<tr>
<td>F5</td>
<td></td>
<td>File, Direct Access</td>
<td>Activates a “Go To…” window, where users can navigate to another form without having to return to the main menu.</td>
<td>Search</td>
<td>Search (CTRL+SHIFT+Y)</td>
</tr>
<tr>
<td>F9</td>
<td></td>
<td>List of values</td>
<td>Lookup Values</td>
<td>List of values</td>
<td>List of values (F9)</td>
</tr>
<tr>
<td>F4</td>
<td></td>
<td>Record, Duplicate</td>
<td>Copy Record</td>
<td>Copy</td>
<td>Copy Record (F4)</td>
</tr>
<tr>
<td>F3</td>
<td></td>
<td>Options, form</td>
<td>Drills down on some forms</td>
<td>Drills Down on some forms</td>
<td>Drills Down on some forms (F3)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Options menu</td>
<td>Related Forms</td>
<td>Related</td>
<td>Related (ALT+SHIFT+R)</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(ALT+SHIFT+R)</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Toggle Menu</td>
<td>Toggle Menu</td>
<td>Toggle Menu (CTRL+M)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Brings up Banner Main Menu</td>
<td>Toggle Open Applications</td>
<td>Toggle Open Applications (CTRL+Y)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Forms previously opened in Banner</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Onboarding/EPAF Process Overview

**Onboarding/ Hiring Process for Temporary/Non-benefitted Employees**

**Employee selected and accepts position**

EPAF submitter 1) submits a hiring packet via MasonOnBoard (masononboard.gmu.edu) to employee’s email address and 2) emails employee relevant offer/welcome letter, separately

- Wage Welcome Letter
- Adjunct Offer Letter
- Grad Student Offer Letter
- Faculty appointment Overload/Additional Assignment Letters

**Once employee begins their packet, view packet for Social Security Number to 1) Search for existing SPAIDEN record and/ or 2) Create a SPAIDEN record if none exists**

See: SPAIDEN - PERSON IDENTIFICATION SCREEN

**Review the employee record in NBILST to see if an Original Hire or Current Hire Approval Category should be selected for the employee**

See: DETERMINE ORIGINAL VS CURRENT HIRE

**Query the next available Suffix for employee in NBILST**

See: IDENTIFY NEXT AVAILABLE SUFFIX

**Begin either a:**

1) CURRENT HIRE EPAF or 2) ORIGINAL HIRE EPAF

**Identify the appropriate Position Type / Position Number sequence for the job**

See: DETERMINE POSITION TYPE, POSITION PREFIX, AND APPROVAL CATEGORY

**Use the Pooled Position Lookup to see what position number should be used depending on the Organization Code the employee should be paid from.**

See: POOLED POSITION LOOKUP

**Complete EPAF Sections:**

1) GENJBF – ENTER POSITION NUMBER/JOB INFORMATION 2) TERMJB – ENTER END DATE 3) OTHER INFORMATION AND COMMENTS

1) Ensure your EPAF is successfully submitted, approved, and applied and 2) follow up on any changes in assignments or changes of timesheet approvers.

See: AFTER YOUR EPAF IS SUBMITTED

1) Select appropriate approvers for your EPAF 2) Submit Transaction and 3) Review any errors

See: ENTER ROUTING AND SUBMIT TRANSACTION  See: ERRORS OR WARNINGS DETAIL FORM
MasonOnBoard

Submitting a Packet

Please visit masononboard.gmu.edu to log-in and submit a hiring packet for the employee.

Log-in

1. Enter 15114 as the employer ID and continue.
2. Enter your user ID, which should be your Mason email address without the @gmu.edu.
3. Enter your PIN

Creating a Packet

4. After you have logged in, you will come to the “Create Packet” screen. You do NOT need to enter the SSN, just click “Continue”

5. Enter the Mandatory Personal Data where * is shown.

   Login ID *
   Auto Generate

   Personal Data

   SSN Not Required:

   First Name *, Middle Initial, Last Name *, Street Address
   Apt/Suite#, Zip Code, City, State
   Telephone Number *, E-mail Address *, Confirm E-mail *

   Job Data

   Start Date (mm/dd/yyyy) *, Location *, Position *, Hire Type *

   Additional Job Data

   Background Check Package *
   G# (Optional)

   For guidance on background check
6. Enter the Mandatory Job Data
   a. Start Date
   b. Location - GMU
   c. Position – GMU
   d. Hire type - Non-benefitted
   e. Background Check Package – for more information, visit http://hr.gmu.edu/emp_relations/cbc/
   f. Has this individual been employed by George Mason in the last 365 days?
      i. No – if they have not had a job in NBILST in the last year or more
      ii. Yes – if the employee is current or had less than a year break in employment

7. Select “Create Hire Packet”

**Follow-up**

Once the employee’s packet has been created, the employee will receive an email to complete their paperwork. Once they have started the personal information page, you can look up the packet and use the information to query or complete a SPAIDEN record.

**Remote Employees**

If an employee has been hired to work at a remote or off-site location and/or is not physically available on campus to present the document(s) in person to verify identity and employment authorization, the employee will need to have the Form I-9 Section 2 completed by an authorized agent on behalf of George Mason University. **For remote employees, it is essential that the department start the process well in advance of the employee’s first work date.** We usually recommend at least 2 weeks in order to provide the employee ample time to locate an Authorized Agent, schedule an appointment, complete the remote I-9 and mail the completed forms and document copies to HR.

**To Begin the Process:**

Submit a MasonOnboard packet and contact HR to provide them with the following information:

- A completed Remote Hire Notice Form
- The employees name
- G# (if assigned)
- First work date
- Position type
- Zip code (used to locate an authorized agent in their area)
- Email address and phone number

HR & Payroll will then facilitate the remote I-9 process with the employee and send them all necessary forms to complete. **The process is only completed when the following are received by HR & Payroll:** 1) employee’s completed original Form I-9 2) Remote Hire Notice form 3) Authorized Agent form and 4) document copies. It is the department’s responsibility to follow-up and ensure that the remote I-9 is completed and received by HR & Payroll within the three day federal requirement. The department will be notified once the process is completed.
Records Retention

All departments should retain the following records electronically:

- Include Welcome Letters and resumes for wage, student wage, and Work-Study employees with the MasonOnBoard packet.
- Due to a revision of the Records Retention Schedule, Adjunct Faculty and Graduate Teaching/Research Assistants contracts are now required to be kept separately for 50 years. You may keep these records on a shared drive folder by year.

Alternatively, the department may retain paper records. However, please send to Records Management after employee termination.
**SPAIDEN - Person Identification Screen**

An employee must have a SPAIDEN record before an EPAF can be submitted for an employee. Most individuals will already have a SPAIDEN record and, by virtue, a G# in Banner. Before creating a G#, you must first search for the employee using Social Security Number and name. After the appropriate SPAIDEN record is identified, updated, and/or created, an EPAF can then be submitted for the assignment.

I. Search for a Banner Record G# using Social Security Number

1. Once you have logged into Banner, type **SPAIDEN** in the search box and click on “General Person Identification”

![Welcome to SPAIDEN](image)

2. Identify whether an employee already has a G# in the system by searching by **Social Security Number**, first.

   ![General Person Identification SPAIDEN 9.3.8](image)

   Get Started: Fill out the fields above and press Go.

   a. If the SSN populates a person record, verify that the name populated matches employee and it is not a mistyping of SSN. Review record for missing or incomplete information and continue to **BEFORE BEGINNING AN EPAF**

   ![General Person Identification SPAIDEN 9.3.8](image)

   Get Started: Fill out the fields above and press Go.

   b. If the search does not yield results, the screen will populate to the “Common Matching Entry” **GOAMTCH**, automatically. Please continue to **II. GENERATE ID AND EVALUATE POTENTIAL MATCHES**
II. Generate ID and evaluate potential matches

If a search for a Banner record using Social Security Number does not produce results, the GOAMTCH form will automatically populate.

1. Click ![Image](image1.png)

2. Click ![Image](image2.png)

**STOP if you do not see “GENERATED” in the ID field and call an HR Assistant.**

3. Enter all of the employee’s information. (Do NOT create Gh’s without a SSN and DOB, with the exception of International employees that may not have an SSN at that time).

4. SAVE to search for matches
   a. If no matches are found, you will be prompted with the message “No matches found, create as new?” Verify your input is accurate. Select “Yes” and jump to **III. COMPLETE SPAIDEN RECORD FOR NEW PERSON**
   
   ![Image](image3.png)

   b. If a potential match exists, a list of matches and potential matches will populate
5. Evaluate matches and potential matches
   a. Match is true if the following match:
      i. SSN and first name match
      ii. First name, Last name, and DOB
b. Match is **inconclusive** if the above match criteria are not met, despite being a “match” in GOAMTCH. Please contact an HR Assistant to assist if a match is inconclusive and **do not continue**.
   
i. Not enough information on existing record to conclude whether match. Matched only on name, no other information exists.

   ![INCONCLUSIVE MATCH]

   ![Duplicate Check]

   ![Select ID]

ii. Evaluate potential matches for slight discrepancies in name, SSN, DOB, etc to evaluate whether existing record or your record is correct.

2. Either **Select ID** OR **Create New**
   
a. If match is CONCLUSIVE, click **Select ID**, review record for missing or incomplete information and continue to **BEFORE BEGINNING AN EPAF**
   
b. If match is INCONCLUSIVE and it has been VERIFIED as NOT BEING A MATCH with an HR Assistant, click **Create New** and continue to **III. COMPLETE SPAIDEN RECORD FOR NEW PERSON**

   ![Update ID]

   ![View Comments]

   ![Create New]
III. Complete SPAIDEN record for new person

Once we have made sure the individual does not already have a Banner record by review in potential matches, we can complete the Banner record. It is highly recommended that you enter in as much information as possible in GOAMTCH as the information automatically populates into the new record.

1. By clicking Create New it will bring you back to the SPAIDEN record.
2. Click Go

Current Identification Tab

3. Enter the following data under the Current Identification tab, without any punctuation:
   a. Last Name
   b. First Name
   c. Middle Name (if applicable)
   d. Prefix (ie Ms, Mr, Dr)
   e. Suffix (if applicable, ie Jr, II)
4. Leave other fields (Name Type, Preferred First Name, and Full Legal Name) blank

Alternate Identification

6. Click on the Alternative Identification tab to link the SSN to the G#. If the employee is International and does not have a SSN yet, please skip this step and move to Address.
7. Enter the following:
   a. Name Type: LGCY
   b. Change Type: ID
   c. ID: 9 digit SSN
8. If you are unable to save due to an error – STOP and call Human Resources.

Address

Permanent Address

9. Click on the Address tab to enter the Permanent Address (PR) and enter the following:
   a. Enter the From Date as today. Leave the To Date blank.
   b. Enter “PR” (Permanent) in Address Type
   c. Enter the Address
   d. Street Line 1: Street Address with Apt or suite, if applicable
   e. ZIP or Postal Code: Enter the zip code. This will automatically populate the City and State.
   f. Enter the phone number

Mason Address

11. To add the Mason Office Address, click the down key on your keyboard to get a blank Address record and enter the following:
   a. Enter the From Date as today. Leave the To Date blank.
   b. Enter “GM” (Mason Office Address) in Address Type

12. Enter the Address
   a. Street Line 1: 4400 University Dr (all employees)
b. **Street line 2:** 3 character mail stop (ex: 3C3)
   c. **ZIP or Postal Code:** Enter zip code 22030. This will automatically populate the **City** and **State**.

Enter the Mason phone number (no hyphens)

### Biographical

14. Click on the **Biographical** tab
15. Enter the following data:
   a. **Birth Date** (<Age> field will automatically populate)
   b. **SSN/SIN/TIN** – Enter Social Security Number

   **NOTE:** For those individuals waiting on permanent SSN numbers from the Social Security Administration, effective immediately, Hiring Departments should now use '000000000' instead of '999xxxxxx'(valid SSN). When using all “0”s you will receive a warning that the SSN is already assigned to another record. You may proceed by clicking “OK” on the warning screen.

   c. **Citizenship** – **DO NOT USE “SP – Substantial Presence”**
      (1) NI – Non-Immigrant
      (2) PR – Permanent Resident
      (3) US -- US Citizen

16. Do NOT enter Marital Status, Legacy, and Religion. This is part of the standard Banner package, but these fields are not maintained for Mason employees.

17. New Ethnicity and Race. Click **xxx** to view the list of acceptable values.

18. If the employee has disclosed any US Military Veteran status, enter in **Veteran Category**. Check the box if the employ discloses that they are a **Special Disabled Veteran**.

19. **SKIP** Confidential, Deceased, Veteran File Number

20. **SAVE**
Email
An email address does not need to be entered for the employee. A Mason email will be automatically generated for the employee once an EP AF has been submitted and it has been completely approved by ALL approvers. After the EP AF has been completely approved, ITS will establish his/her email within 24-48 hours.

Emergency Contact
21. Click on the Emergency Contact tab, if you have this information and enter the following:
   a. Priority: Enter Priority as 1; unless a number is already populated. In that case enter the next number in sequence
   b. Relationship: You can click on the option box *** next to Relationship to select associated code
   c. Last Name
   d. First Name
   e. Address: This will automatically populate as the employee’s permanent address. Please update if this is not accurate.
   f. Telephone (no hyphens)

22. Save 📝
23. Click on the black X in the main toolbar to exit to the main menu.
24. Continue to Before beginning an EP AF
Before beginning an EPAF

Before beginning an EPAF, we must first gather the relevant information needed to complete the EPAF.

We must first:

1. **Determine Original Vs Current Hire**
2. **Determine Position Type, Position Prefix, and Approval Category**
3. **Identify Next Available Position Number/Suffix Combination**

**Determine Original Vs Current Hire**

Before selecting your approval category, it must be determined if the employee is an Original Hire or Current Hire. An Original Hire is someone who has NEVER had a position at Mason before and was never an affiliate. A Current Hire is someone who has held a position at Mason, in any capacity, at any time. To find this information, please follow the guidelines, below:

1. Once you have logged into Banner, type “NBJLST” in home search field
2. Update the **Query Date** to **07-01-02** (the start date for Banner), for accurate results.

3. Click **Go** to view the fields below.
4. Determine whether they are:
   a. **Original Hire** If the employee has never been an affiliate and they do NOT have a position listed, they are considered an Original Hire
   b. **Current Hire** If the employee has a position listed in NBJLST, they are considered a Current Hire
3. Double-check that your **Query Date** is 07-01-02
4. Once we have determined if the employee is an Original Hire or Current Hire, we can them move to **Determine Position Type, Position Prefix, and Approval Category**
## Determine Position Type, Position Prefix, and Approval Category

Before we determine the Position Number to use, we will need to know what Position Type and Position Prefix to search in the Pooled Position Lookup. Review the chart below and determine what Position Type and Position Prefix is needed.

<table>
<thead>
<tr>
<th>Position Type/Employee Class</th>
<th>Approval Category</th>
<th>Position Prefix</th>
<th>Pay Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjunct (AD)</td>
<td>OHADI – Original Hire, Adjunct CHADJ – Current Hire, Adjunct OHSUMR – Original Hire, Summer Research CHSUMR – Current Hire, Summer Research</td>
<td>PO FV – faculty overload SP – summer adjunct SF – 9 mo faculty summer teaching SR – Summer Research</td>
<td>Semi-Monthly (SM)</td>
</tr>
<tr>
<td>Graduate Research Assistant (GR)</td>
<td>OHGRA – Original Hire, GRA CHGRA – Current Hire, GRA</td>
<td>GR</td>
<td>Semi-Monthly (SM)</td>
</tr>
<tr>
<td>Graduate Teaching Assistant, Lecturer, or Graduate Professional Assistant (GA)</td>
<td>OGTTA– Original Hire, GTA or GPA CHGTA – Current Hire, GTA or GPA</td>
<td>GA – Graduate Teaching Assistant GL – Graduate Lecturer GP – Graduate Prof Assistant</td>
<td>Semi-Monthly (SM)</td>
</tr>
<tr>
<td>Resident Assistant (RA)</td>
<td>OHRA – Original Hire, RA CHRA – Current Hire, RA</td>
<td>RA</td>
<td>Semi-Monthly (SM)</td>
</tr>
<tr>
<td>Miscellaneous (MP)</td>
<td>OHMISC– Original Hire, Misc Pay CHMISC – Current Hire, Misc Pay</td>
<td>WM PC – used for instructional faculty</td>
<td>Semi-Monthly (SM)</td>
</tr>
<tr>
<td>Wage (WG) Referred to as non-student wage</td>
<td>OHWAGE – Original Hire, Wage OHWGTD – Original Hire, Wage w Term Date CHWAGE – Current Hire, Wage CHWGTD – Current Hire, Wage w Term Date</td>
<td>WG</td>
<td>Bi-Weekly (26)</td>
</tr>
<tr>
<td>Work Study (WS)</td>
<td>OHWKS– Original Hire, Work Study OHWSTD – Orig Hire, WS w Term Date CHWKS– Current Hire, Work Study CHWSTD – Curr Hire, WS w Term Date</td>
<td>WC</td>
<td>Bi-Weekly (26)</td>
</tr>
<tr>
<td>Student Wage (SW)</td>
<td>OHSWAG – Original Hire, Student Wage OHSWAT – Original Hire, Stu Wg w/ Term D CHSWAG – Current Hire, Student Wage CHSWTWD - Current Hire, Stu Wg w/ Term Da</td>
<td>SW</td>
<td>Bi-Weekly (26)</td>
</tr>
</tbody>
</table>
Identify Next Available Position Number/Suffix Combination

**Pooled Position Lookup**

Identify the appropriate position number to use, for your organization number, by using the “Pooled Position Lookup Form” under Employee Self-Service in Patriotweb.

1. Log-in to Patriot Web Self-Service
2. Click on the “Employee Services tab” and select Pooled Position Lookup Query.

3. Enter the Fund or organization that the position will be paid from and click “Look Up Positions.”
4. Review position numbers listed according to the Position Type and Position Prefix we identified in the chart under **DETERMINE POSITION TYPE, POSITION PREFIX, AND APPROVAL CATEGORY.**

Pooled Position Lookup Results

To view the types of positions available and their usage, select Position Descriptions.

<table>
<thead>
<tr>
<th>Fund/Org for the given position number</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Code: XXXXXXXX</td>
<td></td>
</tr>
<tr>
<td>Fund Code: 10111</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pooled Position and code</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Academic Year Faculty Positions:</strong></td>
</tr>
<tr>
<td>FV Faculty Overload</td>
</tr>
<tr>
<td>PC Faculty Miscellaneous Pay</td>
</tr>
<tr>
<td>PO Adjunct Faculty Teaching</td>
</tr>
<tr>
<td><strong>Academic Year Graduate Assistant Positions:</strong></td>
</tr>
<tr>
<td>GA Graduate Teaching Assistants</td>
</tr>
<tr>
<td>GR Graduate Research Assistants</td>
</tr>
<tr>
<td>GL Graduate Lecturer</td>
</tr>
<tr>
<td>GP Graduate Professional Assistants</td>
</tr>
<tr>
<td>RA Resident Assistants</td>
</tr>
<tr>
<td><strong>Summer Session Positions:</strong></td>
</tr>
<tr>
<td>SR Faculty Summer Research</td>
</tr>
<tr>
<td>SP Summer Faculty Teaching</td>
</tr>
<tr>
<td><strong>Hourly Wage Positions:</strong></td>
</tr>
<tr>
<td>WS Non-Student Wage</td>
</tr>
<tr>
<td>WC Work Study</td>
</tr>
</tbody>
</table>

a. If the Position Number needed exists in the Pooled Position Lookup, ensure the fund/organization number entered is correct and make a note of the Position Number to enter in the EPAF.
b. If the Position Number needed does not exist in the Pooled Position Lookup provide the following information to OSP, if it is grant funded (begins with 20xxx or 22xxx), or hroffice@gmu.edu, if it is not grant funded:
   i. Organization number
   ii. Point of contact for the position - supervisor or a HR Liaison familiar with the work involved for your project
   iii. The begin date of the assignment you will be entering

5. Move to the next step
   a. If employee is Current Hire continue to IDENTIFY NEXT AVAILABLE SUFFIX
   b. If employee is Original Hire, you will use the Suffix of “00” and you can continue to COMPLETING AND SUBMITTING AN EPAF

Identify Next Available Suffix

Once we have determined what position number to use, we must now determine the appropriate Suffix to use for the employee. If it is determined that the employee is an Original Hire, then the suffix will be 00 and you can continue to COMPLETING AND SUBMITTING AN EPAF. If you are not sure, please review DETERMINE ORIGINAL VS CURRENT HIRE to determine whether the employee is Original Hire or Current Hire.

6. Once you have logged into Banner, type “NBULST” in home search field
7. The Query Date will auto-populate with today’s date. Change the date to 07-01-02 (the start date for Banner) for accurate results.

8. Click Go to view the fields below.
9. Select “Filter”

10. Enter the position number you will be using.
11. Make sure you scroll through all results/pages to determine the next available position number/suffix combination.

[Employee Job Inquiry NBIJLST 9.3.3]

ID: G005  Mr Adam M  Query Date: 07/01/2002

<table>
<thead>
<tr>
<th>Position</th>
<th>Suffix</th>
<th>Begin Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PCA682</td>
<td>00</td>
<td>03/10/2013</td>
</tr>
<tr>
<td>PCA682</td>
<td>01</td>
<td>04/10/2013</td>
</tr>
<tr>
<td>PCA682</td>
<td>02</td>
<td>04/25/2013</td>
</tr>
<tr>
<td>PCA682</td>
<td>03</td>
<td>05/10/2013</td>
</tr>
<tr>
<td>PCA682</td>
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<tr>
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<td>07</td>
<td>01/25/2014</td>
</tr>
<tr>
<td>PCA682</td>
<td>08</td>
<td>02/25/2014</td>
</tr>
</tbody>
</table>

12. If the exact position number you will be using is listed, make note of the lowest suffix number that has never been used before. This will be the suffix you will use in your EPAF.

   Ex. if the position number/suffix combination SW139z/00 has been used and the position number is still SW139z, use the suffix 01
   Ex. if the position number you intend on using is PO139z, and the employee has only had position SW139z, you will use the position number/suffix combination of PO139z/00, because the employee has not had that exact position number before.

13. Click X at the top right of the screen to return to the General Menu screen.

14. Move on to Completing and Submitting an EPAF
Completing and Submitting an EPAF

Once we have completed or reviewed the SPAIDEN - PERSON IDENTIFICATION SCREEN, DETERMINED ORIGINAL VS CURRENT HIRE, DETERMINED POSITION TYPE, POSITION PREFIX, AND APPROVAL CATEGORY and IDENTIFIED NEXT AVAILABLE POSITION NUMBER/SUFFIX COMBINATION, we can begin entering our EPAF. Please choose from the EPAF Approval category, below, to enter the particular EPAF and refer to the EPAF Field Requirements, when necessary.

To start:
Skip to CURRENT HIRE EPAF
Or
Skip to ORIGINAL HIRE EPAF

Current Hire EPAF

Once we have completed or reviewed the SPAIDEN - PERSON IDENTIFICATION SCREEN, DETERMINED ORIGINAL VS CURRENT HIRE, DETERMINED POSITION TYPE, POSITION PREFIX, AND APPROVAL CATEGORY and IDENTIFIED NEXT AVAILABLE POSITION NUMBER/SUFFIX COMBINATION, and determined that the employee is a current hire, we can begin a current hire EPAF.

I. Select Approval Category

1. Type “NOAEPAF” in text box from Banner home screen, click Enter to begin the EPAF process.

2. Enter the following:
   a. ID: This is the employee’s G#. This field populates automatically with the last person you were reviewing in SPAIDEN, so ensure this is the same employee.
   b. Query Date: Today’s date. Shortcut - if you type the letter T and press tab, today’s date will be entered.
   c. Approval Category: Clicking the icon next Approval Category and select the appropriate Category Code. Review the DETERMINE POSITION TYPE, POSITION PREFIX, AND APPROVAL CATEGORY and select the Current Hire Approval Category followed by the appropriate Position Type. If you are entering a wage position, you have the option to choose an Approval Category with or without an end date. Please note that wage assignments on grants require an end date.
3. The Approval Type is auto-populated to CHEMPL.
4. Click **Go**

### II. CHEMPL – Change Employee record

5. Double-check whether Current Hire or Original Hire. There should be data in the current value field under the CHEMPL Approval Type. If no information appears under Current Value, stop and begin again as an Original Hire.
6. For a Current Hire, the New Value fields under the CHEMPL Approval Type can be disregarded and you DO NOT need to update these fields in a Current Hire EPAF. But you must save before moving forward!
7. Move on to the next screen by selecting Next Action from the “Tools” menu.

8. Skip to **GENJBF – ENTER POSITION NUMBER/JOBS INFORMATION**
Original Hire EPAF

Once we have completed or reviewed the SPAIDEN - PERSON IDENTIFICATION SCREEN, DETERMINED ORIGINAL VS CURRENT HIRE, DETERMINED POSITION TYPE, POSITION PREFIX, AND APPROVAL CATEGORY, and IDENTIFIED NEXT AVAILABLE POSITION NUMBER/SUFFIX COMBINATION and determined that the employee is an Original Hire, we can begin an Original Hire EPAF.

I. Select Approval Category

1. Type NOAEPAF in text box from Banner home screen, click Enter to begin the EPAF process.

2. Enter the following:
   
   a. **ID:** This is the employee’s G#. This field populates automatically with the last person you were reviewing in SPAIDEN, so ensure this is the same employee.
   
   b. **Query Date:** Today’s date. Shortcut - if you type the letter T and press tab, today’s date will be entered.
   
   c. **Approval Category:** Clicking the icon next Approval Category and select the appropriate Category Code. Review the DETERMINE POSITION TYPE, POSITION PREFIX, AND APPROVAL CATEGORY and select the Original Hire Approval Category followed by the appropriate Position Type. If you are entering a wage position, you have the option to choose an Approval Category with or without an end date. Please note that wage assignments on grants require an end date.

3. The Approval Type is auto-populated to CREMPL.

4. Click **Go**
II. CREMPL – Create Employee record

5. Double-check whether Current Hire or Original Hire. There should NOT be data in the current value field under the CREMPL Approval Type. If information appears under Current Value, stop and begin again as a Current Hire.

6. Update the following information in the New Value column:
   
a. **Employee Class Code** This will automatically populate with e-class associated with the Position Type. 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. **Campus Code** Enter the campus on which the employee will be located. If employee works are Fairfax, FX is the default. However, please be sure to update their location if they are on a different campus or work remote.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Class Code</td>
<td>AD</td>
<td></td>
</tr>
<tr>
<td>Home COAS</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Home Organization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Distribution Org</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Campus Code</td>
<td></td>
<td>FX</td>
</tr>
<tr>
<td>Current Hire Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I-9 Form Indicator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I-9 Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I-9 Expiration Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Work Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term Reason Code</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   f. **Current Hire Date** This is the same date as the employee’s Jobs Begin Date
   
g. **I-9 Form Indicator** – Leave this blank, employee will need to come to HR to complete his/her I-9.
   
h. **I-9 Date** – Leave this blank
   
i. **I-9 Expiration** – Leave this blank
7. Once you have entered information, save your changes.

8. Move on to the next screen by selecting **Next Action** from the “Tools” menu.

9. Skip to **GENJBF – Enter Position Number/Job Information**.
GENJBF – Enter Position Number/Job Information

1. 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).

2. The next step is to enter the position number. If you do not know what position number to use, go to IDENTIFY NEXT AVAILABLE POSITION NUMBER/SUFFIX COMBINATION and the APPROVAL CATEGORY/POSITION NUMBER SEQUENCE CHART.

3. Press TAB, and then enter the Suffix.

4. Click Go

Please note: Once you click Go to reach the next fields, the position number cannot be changed and you will need to DELETE OR VOID YOUR TRANSACTION.

5. The 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.

6. Enter the job information in the New Value fields according to the Position Type
   a. Skip to ADJUNCT, GRADUATE RESEARCH ASSISTANT, AND GRADUATE TEACHING ASSISTANT OR GRADUATE PROFESSIONAL
   b. Skip to MISCELLANEOUS PAY
   c. Skip to NON-STUDENT WAGE, STUDENT WAGE, WORK STUDY
Adjunct, Graduate Research Assistant, and Graduate Teaching Assistant or Graduate Professional

Note: If there is already information under the Current Value fields at this stage, you have entered a suffix that has already been used and you will need to DELETE OR VOID YOUR TRANSACTION and IDENTIFY NEXT AVAILABLE POSITION NUMBER/SUFFIX COMBINATION.

1. Enter the following:
   a. **Employee Class Code** This will automatically populate with e-class of the Approval Category you have selected. 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. Please refer to the EPAF Field Requirements for semester dates.
   c. **Personnel Date** Leave blank or update it to reflect the true begin date of the employee. For instance, GAs typically start on 8/25, but if they started actually work on 9/1, you can put this in personnel date.
   d. **Jobs Begin Date** – Must be the same as the job effective date, either the 10th or the 25th. Please refer to EPAF Field Requirements.
   e. **Hours per Day** Please refer to EPAF Field Requirements.
   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** – Please refer to EPAF Field Requirements.
   h. **Title**
      i. For adjuncts, enter the class title, course number, and course section. **An EPAF must be done for each course taught.** Please note there is a 30 character limit and you should type the title in directly, do not copy and paste from another source.
      ii. For other employment types, it is recommended you use a brief but useful 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.
   i. **FTE** This will automatically populate with .25 for Adjuncts and Graduate Teaching Assistants. It can be revised as needed with a value greater than 0 and less than 1. Please refer to the EPAF Field Requirements.
   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 for adjuncts and 9 for graduate assistants. 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 and cannot be changed.

n. **Contract Type** This will automatically populate with P. If this is not the employee’s primary job, please update to “O” for Overload.

o. **Salary Encumbrance** Will automatically populate. It cannot be changed.

2. Once you have entered information in all the required fields on the **GENJB** page, **SAVE**.

3. Move on to the next screen by selecting **Next Action** from the “Tools” menu.

4. **Skip to the next step** - **TERMJB – Enter End Date**
**Miscellaneous Pay**

Note: If there is already information under the **Current Value** fields at this stage, you have entered a suffix that has already been used and you will need to **DELETE OR VOID YOUR TRANSACTION** and **IDENTIFY NEXT AVAILABLE POSITION NUMBER/SUFFIX COMBINATION**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Class Code</td>
<td></td>
<td></td>
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<tr>
<td>Jobs Effective Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel Date</td>
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<td></td>
</tr>
<tr>
<td>Job Begin Date*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hours per Day</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Salary*</td>
<td></td>
<td></td>
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<tr>
<td>Hours per Pay</td>
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<td>Title</td>
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<td>Job Change Reason</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract Type</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Review the **Supplemental Pay Procedures** to ensure the miscellaneous pay is the appropriate method of payment. Miscellaneous pays can only be paid to current exempt employees or current adjunct for particular duties.
- Enter the following:
  a. **Employee Class Code** This will automatically populate with e-class of the **Approval Category** you have selected. 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.
  c. **Personnel Date** Leave blank or update it to reflect the true begin date of the employee. For instance, GAs typically start on 8/25, but if they started actually work on 9/1, you can put this in personnel date.
  d. **Jobs Begin Date** – Must be the same as the job effective date, either the 10th or the 25th. Please refer to **EPAF Field Requirements**
  e. **Hours per Day** - Please refer to **EPAF Field Requirements**
  f. **Annual Salary** - Enter the total amount to be paid for the assignment. This is a required field.
  g. **Hours per Pay** – Please refer to **EPAF Field Requirements**
  h. **Title** Enter the title of what the employee is being paid for ex. “Coordinator x Program”
  i. **FTE** This will automatically populate with .25 for Adjuncts and Graduate Teaching Assistants. It can be revised as needed with a value greater than 0 and less than 1. Please refer to the **EPAF Field Requirements**
  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 1 for miscellaneous pay. 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 and cannot be changed.
  n. **Contract Type** This will automatically populate with P. If this is not the employee’s primary job, please update to “O” for Overload.
  o. **Salary Encumbrance** Will automatically populate. It cannot be changed.
3. Once you have entered information in all the required fields on the GENJBF page, save.
4. Move on to the next screen by selecting Next Action from the “Tools” menu.

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction</td>
</tr>
<tr>
<td>Submit Transaction</td>
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<tr>
<td>Apply Transaction</td>
</tr>
<tr>
<td>Cancel PAF</td>
</tr>
<tr>
<td>Delete PAF</td>
</tr>
<tr>
<td><strong>Next Action</strong></td>
</tr>
</tbody>
</table>

5. Skip to the next step - TERMJB – Enter End Date
Non-Student Wage, Student Wage, Work Study

Note: If there is already information under the Current Value fields at this stage, you have entered a suffix that has already been used and you will need to DELETE OR VOID YOUR TRANSACTION and IDENTIFY NEXT AVAILABLE POSITION NUMBER/SUFFIX COMBINATION.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Class Code</td>
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<td></td>
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<tr>
<td>Jobs Effective Date*</td>
<td></td>
<td></td>
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<tr>
<td>Personnel Date</td>
<td></td>
<td></td>
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<tr>
<td>Job Begin Date*</td>
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<td>Timesheet Orgn*</td>
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<td></td>
</tr>
<tr>
<td>Time Entry Method</td>
<td></td>
<td>W</td>
</tr>
</tbody>
</table>

1. Enter the following:
   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. **Personnel Date** Leave 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 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.
   k. **Appointment Percent** This will automatically populate with 100. It cannot be changed.**Job Change Reason**
This will automatically populate and cannot be changed.

l. **Contract Type** This will automatically populate with P. If this is not the employee’s primary job, please update to “O” for Overload.

m. **Salary Encumbrance** Will automatically populate. It cannot be changed.

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

7. Once you have entered information in all the required fields on the GENJB page, **SAVE**

8. Move on to the next screen by selecting **Next Action** from the “Tools” menu.

9. Move on to the next step:
   a. If you selected an approval category that includes a termination date, skip to **TERMJB – ENTER END DATE**
   b. If you selected an approval category that does **not** include a termination date, skip to **OTHER INFORMATION AND COMMENTS**
TERMJB – Enter End Date

1. Notice that the Approval Type has changed to TERMJB Termination of job

2. Click

3. Enter the following:
   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. Please refer to the EPAF Field Requirements
   b. Personnel Date This is generally the same as the end date, but can be used to indicate true last work date.
   c. Jobs End Date This date must match the job effective date. This is a required field.
   d. Job Status This will auto-populate with T for termination. It cannot be changed.
   e. Job Change Reason Will auto-populate with CA (completion of appointment). It cannot be changed.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs Effective Date</td>
<td></td>
<td>12/09/2010</td>
</tr>
<tr>
<td>Personnel Date</td>
<td></td>
<td>12/09/2010</td>
</tr>
<tr>
<td>Job End Date*</td>
<td></td>
<td>12/09/2010</td>
</tr>
<tr>
<td>Job Status*</td>
<td>T</td>
<td></td>
</tr>
<tr>
<td>Job Change Reason*</td>
<td>CA</td>
<td></td>
</tr>
</tbody>
</table>

4. SAVE

5. Move on to the 1) Other Information and Comments and 2) Enter Routing and Submit Transaction sections
Other Information and Comments

1. Click on the Other Information and Comments tab.

2. Enter any additional information you wish to include, a comment is only required when:
   a. For student wage, wage, and work study positions - you must include the Timesheet approvers’s Name, G#, and position #. Otherwise, the employee will be unable to fill out their timesheet.
   b. For positions funded by sponsored research – you must include term length, projected labor amount, and grant number.

3. Once you have entered information in the Other Information and Comments field, SAVE.

4. Move on to ENTER ROUTING AND SUBMIT TRANSACTION
Enter Routing and Submit Transaction

1. Click on the **Routing** tab to enter approvers.

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Default Earnings</th>
<th>Job Substitution</th>
<th>Routing</th>
<th>Other Information and Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Routing</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Originator ID**: MKIRK4

**Name**: Ms Megan Rhiannon Krk

- **Level Code**: REQAPP
- **Level**: 10
- **User ID**: ...

- **Level Code**: APPLY
- **Level**: 90

2. You can type in the User ID directly into the field, or select **...** and choose the designated approver from the list.

3. Enter the REQAPP and APPLY level approvers:
   a. **Required Approver** (level REQAPP) – the designated approver for your department.
   b. **Applier** (level APPLY) - select an HR Assistant. Your EPAF goes to a general box in HR, so it is not necessarily approved by that person, but it will be approved by someone in central HR, generally within 1-2 business days, in the order they are received.

   **Note**: additional approvals will automatically be inserted upon submission if it requires OSP, FINAID, and/or Provost approval.

4. Once you have entered routing information, **SAVE**

5. Submit your transaction by selecting **Submit Transaction** from the “Tools” menu.
6. If submission is complete, the top right corner should say “transaction submitted” and the Transaction Status will say “pending.”

7. Move on to the next step:
   a. If your Transaction Status says “Pending” continue to **AFTER EPAF IS SUBMITTED**
   b. If your Transaction Status still says “Waiting” or you get an error message after you have tried to submit continue to **ERRORS OR WARNINGS DETAIL FORM.**
Errors or Warnings Detail Form

If there is a Banner error on your form, you will not be able to move forward with submitting your transaction.

1. If there is an error on your EPAF, you will either be:
   a. Taken directly to the “Electronic Approvals Error Message,” NOIEMSG page.

   ![Electronic Approvals Error Message NOIEMSG 9.3.3](image)
   
   Started: Fill out the fields above and press Go.
   i. To view any errors, click **Go**
   ii. To exit back to NOAAPEAF, click **Start Over** to rollback, then close **X**

   ![Start Over](image)

   b. Notified via an error message to the top right of the screen

   ![Top Right Error Message](image)

   e: 03/15/2018  Last Paid Date:  
   ❌0001Z  Adjunct Faculty  Suffix: 00

   ![Error Message with New Values](image)

<table>
<thead>
<tr>
<th>New Value</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/09/2010</td>
<td></td>
</tr>
<tr>
<td>12/09/2010</td>
<td></td>
</tr>
<tr>
<td>12/09/2010</td>
<td>❌</td>
</tr>
</tbody>
</table>

2. Review errors and refer to the **Banner Common Errors** to resolve.

3. Click **Start Over** to roll back to the top of the EPAF screen.

4. Navigate through the EPAF screens to correct errors by clicking `...` from the Approval Type field

   ![Approval Type](image)

   Approval Type: `TERMJB`  `...`  Termination of job

5. Once errors are resolved, submit your transaction by selecting **Submit Transaction** from the “Tools” menu.

6. If submission is complete, the top right corner should say “transaction submitted” and the Transaction Status will say “pending.”

   ![Transaction Submitted](image)
After your EPAF is submitted

Ensure the assignment gets applied
After your EPAF has been successfully submitted and is in a “Pending” status, it is the submitter’s responsibility to check back and ensure the position is applied. If additional approvers are required, allow additional time for approval. HR will approve within 1-2 business days in the order they are received. Please do not request approval expedition by HR as the inbox is monitored constantly throughout the day.

If your EPAF is Returned for Correction by an approver or HR, please review the EPAF Field Requirements in resolving errors and resubmit your transaction.

Once your EPAF is in “Completed” status, it has been successfully been approved and applied to the employee’s record. An email address will automatically be generated under the “Email” tab in SPAIDEN by ITS. This is important to keep in mind when entering original hire employees because they will not be able to access patriotweb or email before this process occurs. The activation and provisioning of net ids and emails is an ITU function. Instructions for activating email can be found on the IT services website http://tsd.gmu.edu/services/strongpassword/

Terminate assignments that should no longer continue
It is also the responsibility of the department to terminate assignments when the employee is no longer working. Course cancellations happen often, so the assignment must be terminated immediately to ensure that the employee is not overpaid. Additionally, wage positions should be terminated as soon as the employee stops work, to prohibit access to systems and facilities that they should no longer have access to.

While it is essential to terminate assignments as soon as the employee is no longer working for security/access reasons, wage assignments will automatically be terminated by HR should the employee not submit time for 150 days. Please keep this in mind when wage, student wage, and work study employees take semesters off, take an extended summer break, etc. In order to reactivate their assignment, a new EPAF must be entered with the next appropriate suffix.

Skip to Terminating an Assignment

Update Timesheet approvers for hourly wage assignments (non-student wage, wage, work study)
Timesheet approvers often change positions or leave the University. If a timesheet approver changes positions or leaves the University, it is essential that the department complete a Timesheet Approver Change Form to ensure that employees can successful fill out a timesheet, submit their time, and have it approved.
Terminating an assignment

If an assignment should cease to continue or be canceled, you will need to submit an EPAF to terminate the assignment immediately to avoid overpayment.

If an assignment already has an end date in the NBILST skip to Early Termination EPAF.

If an assignment does not already have an end date in NBILST skip to Termination EPAF. Generally, this is only used for hourly wage assignments that are open-ended.

Early Termination EPAF

An Early Termination EPAF are for assignments that already have an end date in the system.

1. Type NOAEPAF in text box from Banner home screen, click Enter to begin the EPAF process.

2. Enter the following:
   a. ID: This is the employee’s G#. This field populates automatically with the last person you were reviewing in SPAIDEN, so ensure this is the same employee.
   b. Query Date: Today’s date. Shortcut - if you type the letter T and press tab, today’s date will be entered.
   c. Approval Category: Clicking the icon next Approval Category and select the appropriate Category Code. Review the Approval Category/Position Number Sequence Chart and select the Early Termination Approval Category followed by the appropriate Position Type. The approval category for the early termination EPAF must match the type of EPAF originally submitted. For example, to terminate a Graduate Teaching Assistant, an ETGTA (Early Termination, GTA) must be used. If the class codes do not match, the EPAF will not be successful.
5. Enter the **Position Number** and **Suffix** you wish to terminate by clicking on the icon after the position or suffix field to choose the appropriate value. Click on the **List of Employee’s Jobs (NBJLST)**.

Make sure the position number you wish to end early is highlighted and double click in the position field or click on the icon. **This position must have an end date already in Banner for the early termination EPAF to be successful.** Refer to the **Termination EPAF** if the position does not have an end date already in Banner.

3. Click **Go** to enter the termination date under New Value. The Current Value column is grayed out and cannot be changed.

4. **Jobs Effective Date** Type the date of the employee’s last worked date. The termination date must be on or after the ‘Last Paid Date’ displayed at the top of the form.
a. **Non-Student Wage, Student Wage, and Work Study** employees will not be able to access his/her timesheet after the date entered here.

b. **GTA, GRA, Adjunct, Misc Pay, RA, and Summer Research** The end date should be the 9th or 24th, at the end of the pay period, except for special circumstances. If you are terminating the assignment completely meaning it should not be paid at all, the date entered will be the same date as the Jobs Begin Date.

5. **SAVE**

6. Skip to **Other Information and Comments** and **Enter Routing and Submit Transaction**
Termination EPAFs are for assignments that do not already have an end date in the system.

1. Type NOAEPAF in text box from Banner home screen, click Enter to begin the EPAF process.
2. Enter the following:
   a. **ID**: This is the employee’s G#. This field populates automatically with the last person you were reviewing in SPAIDEN, so ensure this is the same employee.
   b. **Query Date**: Today’s date. Shortcut - if you type the letter T and press tab, today’s date will be entered.
   c. **Approval Category**: Clicking the icon next Approval Category and select the appropriate Category Code. Review the Approval Category/Position Number Sequence Chart and select the Early Termination Approval Category followed by the appropriate Position Type. The approval category for the early termination EPAF must match the type of EPAF originally submitted. For example, to terminate a Graduate Teaching Assistant, an ETGTA (Early Termination, GTA) must be used. If the class codes do not match, the EPAF will not be successful.

6. Enter the Position Number and Suffix you wish to terminate by clicking on the icon after the position or suffix field to choose the appropriate value. Click on the List of Employee’s Jobs (NBULST).
Make sure the position number you wish to end early is highlighted and double click in the position field or click on the icon. This position cannot have an end date already in Banner for the termination EPAF to be successful. Refer to the Early Termination EPAF if the position already has an end date in Banner.

3. Click to enter the termination date under New Value. The Current Value column is grayed out and cannot be changed.

4. Jobs Effective Date Type the date of the employee’s last worked date. The termination date must be on or after the ‘Last Paid Date’ displayed at the top of the form. Employees will not be able to access his/her timesheet after the date entered here.

5. Save

6. Skip to Other Information and Comments and Enter Routing and Submit Transaction
Appendix

Delete or Void your Transaction

Deleting
You can delete your transaction if you have not yet submitted the EPAF. Select “Tools” from the EPAF menu and click “Delete PAF.”
Voiding

Steps for voiding your transaction:

While in NOEPAF:
1. In Banner, go to the NOEPAF screen
2. Enter your transaction #
3. Press Ctrl+ Page Down or the “Next Block” icon
4. In the bottom left you will see a drop down “Approver Action” field.
5. Click on the drop down box
6. Select “Void”
7. Save

While using NOAAPSM (Generally used when “returned for correction”)
1. In Banner go to NOAAPSM
2. Click the drop-down box next to "Transaction Status" and choose "Return/Correction"
3. Click the drop-down box next to "Queue Status" and choose "None (Originator)"
4. Ctrl+Page Down
5. Highlight the transaction you want to void
6. the drop-down box next to "Approver Action" and choose "Void"
7. Save
## Navigation Short Cuts

Please refer to the Navigation Short Cuts, below on the next page, when navigating through Banner. The 3 F's: file, rollback, and refresh will be your best friend when navigating through the Banner screens and will populate and allow you to update the fields on that screen.

<table>
<thead>
<tr>
<th>Banner 8 Icon</th>
<th>Banner 8 Keyboard</th>
<th>Banner 8 Menu</th>
<th>Explanation</th>
<th>Banner 9 Icon</th>
<th>Banner 9 Keyboar</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Save" /></td>
<td>Save (F10)</td>
<td>File, Save</td>
<td>Saves all changes made in a form since the last time you saved. Banner also refers to save as Commit in some messages.</td>
<td>Lower right hand corner of screen</td>
<td><img src="image" alt="Save" /> Save (F10)</td>
</tr>
<tr>
<td><img src="image" alt="Rollback" /></td>
<td>Rollback (Shift+F7)</td>
<td>File, Rollback</td>
<td>Clears all information and returns you to the Key Block of a form.</td>
<td><img src="image" alt="Start Over" /></td>
<td>Rollback/Refresh (F5)</td>
</tr>
<tr>
<td><img src="image" alt="Select" /></td>
<td>Select (Shift+F3)</td>
<td>File, Select</td>
<td>Enters the highlighted value into the current field of the form you are working from. List of values uses OK as the select.</td>
<td><img src="image" alt="SELECT" /></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Insert" /></td>
<td>Insert Record (F6)</td>
<td>Record, Insert</td>
<td>Inserts a new blank record into a group of existing records.</td>
<td><img src="image" alt="Insert" /> Insert Record (F6)</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Remove" /></td>
<td>Remove Record (Shift+F6)</td>
<td>Record, Remove</td>
<td>Removes all information for the record. When you Save, the record will be deleted from the database.</td>
<td><img src="image" alt="Delete" /> Remove Record (SHIFT+F6)</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Previous" /></td>
<td>Previous Record (Up Arrow)</td>
<td>Record, Previous</td>
<td>Moves the cursor to the first enterable field in the previous record.</td>
<td><img src="image" alt="Previous Record (UP ARROW)" /></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Next" /></td>
<td>Next Record (Down Arrow)</td>
<td>Record, Next</td>
<td>Moves the cursor to the next enterable field in the next record. If the cursor is at the last record, a new record is created.</td>
<td><img src="image" alt="Next Record (DOWN ARROW)" /></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Previous Block" /></td>
<td>Previous Block (Ctrl+Pg Up)</td>
<td>Block, Previous</td>
<td>Moves the cursor to the previous information block in a form.</td>
<td><img src="image" alt="Previous Block/Section (ALT+PG UP)" /></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Next Block" /></td>
<td>Next Block (Ctrl+Pg Down)</td>
<td>Block, Next</td>
<td>Moves the cursor to the next information block in a form. If the next block is in another window of the form, that window will be opened.</td>
<td><img src="image" alt="Next Block/Section (ALT+PG DOWN)" /></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Enter Query" /></td>
<td>Enter Query (F7)</td>
<td>Query, Enter</td>
<td>Puts the form into query mode and lets you enter search criteria to see what information is already in the database.</td>
<td><img src="image" alt="Filter Again" /> Open new form to add fields for querying – more</td>
<td>Enter Query/Filter (F7)</td>
</tr>
<tr>
<td><img src="image" alt="Execute" /></td>
<td>Execute (F8)</td>
<td>Query, Execute</td>
<td>In query mode, searches the database and displays any records that match the search criteria.</td>
<td><img src="image" alt="Go" /></td>
<td>Execute Query/Filter (F8)</td>
</tr>
<tr>
<td>Banner 8 Icon</td>
<td>Banner 8 Keyboard</td>
<td>Banner 8 Menu</td>
<td>Explanation</td>
<td>Banner 9 Icon</td>
<td>Banner 9</td>
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<tr>
<td>---------------</td>
<td>------------------</td>
<td>---------------</td>
<td>-------------</td>
<td>---------------</td>
<td>---------</td>
</tr>
<tr>
<td>Cancel (Ctrl+Q)</td>
<td>Query, Cancel</td>
<td>Cancels a query and takes a form out of query mode.</td>
<td>CANCEL</td>
<td>Cancel (CTRL+Q)</td>
<td></td>
</tr>
<tr>
<td>Print (Shift+F8)</td>
<td>File, Print</td>
<td>Captures the active screen (only what you can see) and prints it to your local printer.</td>
<td>TOOLS</td>
<td>Print (CTRL+P)</td>
<td></td>
</tr>
<tr>
<td>Online Help (F1)</td>
<td>Help, Online Help</td>
<td>Displays the Help window for the current field</td>
<td>Help (CTRL+SHIFT+L)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exit (Ctrl+Q)</td>
<td>File, Exit</td>
<td>In a menu, the Exit command takes you out of Banner. In a form, the Exit command takes you out of the form. In a query mode, the Exit command cancels the query.</td>
<td>Exit (CTRL + Q)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>F5</td>
<td>File, Direct Access</td>
<td>Activates a “Go To...” window, where users can navigate to another form without having to return to the main menu.</td>
<td>Search (CTRL+SHIFT+Y)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>F9</td>
<td>List of values</td>
<td>LOOKUP VALUES</td>
<td>List of values (F9)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>F4</td>
<td>Record, Duplicate</td>
<td>COPY RECORD</td>
<td>Copy Record (F4)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>F3</td>
<td>Options, form</td>
<td>Drills down on some forms</td>
<td>Drills Down on some forms (F3)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Options menu</td>
<td>Related Forms</td>
<td>Related (ALT+SHIFT+R)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>TOGGLE MENU</td>
<td>Brings up Banner Main Menu</td>
<td>Toggle Menu (CTRL+M)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>TOGGLE OPEN APPLICATIONS</td>
<td>Forms previously opened in Banner</td>
<td>Toggle Open Applications (CTRL+Y)</td>
<td></td>
</tr>
</tbody>
</table>
Banner Common Errors

If you submit a transaction and receive the Errors and Warnings Information PAGE press Ctrl+ Page Down to see the errors. You can also select “Options,” then “Errors or warning detail form.” Press Ctrl+ Page Down to see the warnings and errors.

*ERROR* This employee already has a primary job
Please go back to the General Job screen where the Begin date and salary is entered. Scroll down to the “Contract type” field and change the “P” for Primary to the letter “O” for Overload. “S” for Secondary should never be selected.

*ERROR* Salary Encumbrance cannot be entered
Please review the approval category in conjunction with the position number. This error means that you are selecting the wrong approval category for the position number or vice versa (See appendix Figure F).

*ERROR* New Effective Date cannot be after Employee’s Termination Date
The approval category should be “Current Hire,” rather than “Original Hire.” Please void (See appendix Figure A) this transaction and begin a new “Current Hire” transaction.

*ERROR* First Name, SSN/SIN, Birth Date or Gender incomplete
The employee’s SPAIDEN record is incomplete. Please go back to SPAIDEN under the Biographical tab and complete any missing information. If the employee does not have an SSN, please enter 9 O’s in the SSN field under the biographical tab ONLY. A warning will pop up, but you can disregard this message and continue on.

*ERROR* Missing mandatory Citizen Code
Please review the employee’s SPAIDEN record and enter their citizen code under the Biographical tab. If you are unsure of the citizen code, please contact the employee for this information. This does NOT ensure eligibility to work in the United States, but is used for reporting purposes.

*ERROR* Unable to complete initial edit execution (Oracle Error -1001)

*ERROR* Invalid Employee Class Code
The approval category should be Original Hire, rather than Current Hire. You must first void this transaction (See appendix Figure A.) Then, begin a new EPAF and select the new approval category containing “Original Hire.” If you have submitted multiple EPAFs for an employee where the first EPAF is an Original Hire approval category, you must wait for the Original Hire EPAF to be approved and applied before submitting subsequent Current Hire EPAFs for the same individual.

*ERROR* Base Job cannot begin before the position. Check position dates
When a new position is created, the position begin date is set as the day it was created, unless noted otherwise. Please email HRDM@gmu.edu to request a change in position begin date – it will need to be on or before the begin date of the employee’s assignment.
*ERROR* Job Begin Date cannot be after Employee’s Termination Date
*ERROR* New Effective Date cannot be after Employee's Termination Date
The approval category should be Current Hire, rather than Original Hire. You must first void this transaction (See appendix Figure A.) Then, begin a new transaction using a Current Hire approval category.

*ERROR* Date cannot be prior to the Base Job Begin Date of XX date
The suffix you are using has already been used. This transaction has to be deleted by selecting “Options” – “Delete PAF.” Please check the Employee Job Inquiry form (NBIJLST) with the query date of 07-01-02 to determine the next appropriate suffix.

*ERROR* I9 Date must be entered
The I-9 information is no longer required before submitting an EPAF; however, if you have entered anything within the three I-9 fields these fields must be completed. Please be sure that BOTH the “I-9 Form Indicator” field and the “I-9 Date” field are completed or BOTH left completely blank. While the I-9 information is not required to submit an EPAF, the I-9 must be completed within 3 business days.

*ERROR* All Approval types must be committed before submitting
This error will appear when you have not saved after every action. Please navigate through the EPAF from the beginning and save after every action. In addition, please be sure that if your EPAF requires an end date it is properly filled out and saved. If you have saved all of your information then it will allow you to submit your transaction.
Returned for Correction Reasons Explained

When an EPAF is “Returned for Correction,” you must make the correction and resubmit the EPAF. When the EPAF is resubmitted, it starts over in the approval process and must be reapproved by all approvers. As an EPAF originator, you are responsible for ensuring that your EPAF is submitted on time, successfully “completed,” and, if necessary, terminated appropriately in order to avoid overpayments. Please review figure B in the appendix for an explanation of transaction statuses.

**OSP Returns**

Begin date is prior to the start date of the project

If pre-award spending is allowed, please add an explanation in the comment section and provide a guaranteed organization code.

End date missing on wage, student wage, or work study assignments

Please use an EPAF with an approval category that has a termination date. First, you must void this transaction (See appendix Figure A.) Please choose an EPAF with an approval category that has an end date. Ex. Curr Hire, Wage w Term Date – CHWGT or Current Hire Stu Wg w/Term Da – CHSWTD.

End date of assignment is later than the end date for the period of performance on the project

If a no cost extension is anticipated, please note that in the comment section and provide a guarantee organization code (an organization code that will pick of the costs if sponsored funding is overspent or unavailable).

On wage or student wage assignment, the number of hours per week or the maximum pay is missing

Enter the hours per week or the total pay for the entire assignment in the comment section.

Grant is overspent

If additional funding is anticipated, please give details and a guarantee organization code (an organization code that will pick of the costs if sponsored funding is overspent or unavailable) in the comments section.

**HR/Provost Returns**

End date must be on or after the last paid date

The position you are trying to terminate must be terminated on or after the last paid date. Please go back into the transaction and review the “Last Paid Date” field at the top of the EPAF.

Effective date must be after the last paid date

When completing a “MODPAY” EPAF, the employee’s rate of pay cannot be changed on or before their last paid date. Please use the first date of the new pay period.

Effective date and end date must be the same date on the termination screen

On the job information screen, the effective date and end date must be identical.

Pays and factors do not match begin and end dates
Pays and factors are the number of pay periods someone is being paid over. 1/1 means that they are being paid for one pay period. Subsequently, the begin and end date should reflect the amount of pay periods an employee is being paid over. For example, GRAs will be paid 1/10/12 – 5/24/12 which is over 9 pay periods which means there will be 9 pays and factors. For the payroll schedules please review [http://hr.gmu.edu/time/schedule/](http://hr.gmu.edu/time/schedule/).

**Position should be PC instead of WM**

This EPAF has been returned by the Provost Office. Depending on the employee’s current employment status, the miscellaneous pay position number will begin with PC or WM. PC is to be used for Instructional faculty. First, you must void your transaction (See appendix Figure A.) Then, you will need to create a new transaction. Please consult the position prefix decision tree for identifying the appropriate position prefixes [http://hr.gmu.edu/payguides/tree.php?lvl=2](http://hr.gmu.edu/payguides/tree.php?lvl=2).

**Position number and Approval Category do not match/correlate**

Position number and/or approval category cannot be changed after the position number is entered and saved. We have voided your transaction, so a new transaction with the appropriate approval category and position number needs to be entered. The Approval Category is what you select according to what type of a position you are entering for the employee. If you do not have a correlating position number listed for the particular approval category, please email HRoffice@gmu.edu to have this position number created. If position number does not exist for grant/fund types 20xxxx or 22xxxx, please contact your grant accountant in the Office of Sponsored Programs.

**Hours per day and hours per pay must correlate for wage positions**

For wage, student wage, and work study employees, hours per day and hours per pay must correlate. Generally, it is best to go by the intended hours per pay on the biweekly pay schedule. If an employee will be working an estimated 40 hours over a two week period, the hours per pay would be 40 with hours per day being 4. Refer to the [EPAF Field Requirements](http://hr.gmu.edu/payguides/tree.php?lvl=2) for an hours chart.

**Returned - Hours per day and hours per pay must correlate for graduate assistants**

For graduate assistants hours per day and hours per pay must correlate. This is particularly important because hours per pay is what is used to factor the student’s eligibility for health insurance and whether they qualify as a full time or part time student. These employees follow the semi-monthly pay schedule. Refer to the [EPAF Field Requirements](http://hr.gmu.edu/payguides/tree.php?lvl=2) for an hours chart.

**Returned - Position begin and end dates must follow the semi-monthly pay structure**

The pay structures must be followed for all positions except for hourly wage assignments (Wage, work study, student wage). They begin on the 10th or 25th and end on the 9th or 24th. Please refer to [http://hr.gmu.edu/time/schedule/](http://hr.gmu.edu/time/schedule/).

**Special characters cannot be in the job title**

Please do not enter special characters in the job title including commas, periods, dashes, slashes, etc.

**Timesheet approver’s name, G#, and position # not provided**

In order for a wage, student wage, or work study employee to submit their timesheet, we must have the timesheet approver’s name, G#, and position #. This information can be obtained by doing a name search of the timesheet approver in the Employee Job Inquiry form (NBULST). Timesheet approver information should be in its own comment block and should be formatted as follows:
Ex: “ts Approver Name, G#, Position #.” If a timesheet approver is going on leave, changing positions, or leaving the University, please notify us ASAP by filling out a timesheet approver/supervisor change form - http://hr.gmu.edu/forms_standard/talent_acquisition/TimeSheetLandscape.pdf

**Transactions Statuses**

You will to write down the transaction number for each transaction you enter. You can go back into NOAEP AF and type in the transaction # to check the status of your EP AF. You can also check the status of your EP AFs in NOAAPSM. It is a submitter’s duty to make sure your EP AF has made it through the process. By merely submitting the EP AF it does not mean that it is guaranteed to make it through the process.

Below is an explanation of the various transaction statuses:

<table>
<thead>
<tr>
<th>Transaction Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waiting</td>
<td>This transaction has not yet been submitted. If you are unable to submit due to errors, please review the errors screen and fix as necessary.</td>
</tr>
<tr>
<td>Pending</td>
<td>Transaction has been submitted to the approval queue. Under the routing tab, it will say “pending” next to who it’s waiting to be approved by.</td>
</tr>
<tr>
<td>Return for Correction</td>
<td>Transaction has been returned to the Originator to correct. Please correct errors and resubmit. It will then go through the required approval process again.</td>
</tr>
<tr>
<td>Approved</td>
<td>Transaction has been approved by all approvers. The “apply” process runs at 9am, 12pm, 3pm, and 6pm. Unless it is returned for correction before that time, it will be applied to the employee’s job record.</td>
</tr>
<tr>
<td>Complete</td>
<td>Transaction has been applied to the database.</td>
</tr>
<tr>
<td>Disapproved</td>
<td>Transaction is not approved.</td>
</tr>
<tr>
<td>Void</td>
<td>The transaction is no longer available, but remains in EP AF history. It is different from Delete because history is maintained.</td>
</tr>
</tbody>
</table>

You can also check the status of your EP AFs in NOAAPSM:

1. Update the **Transaction Status** to “All” (or “Return for Correction,” “Pending,” “Completed,” Etc.)
2. Update the **Queue Status** to “None(Originator).”
3. Click [Go] to review transactions statuses. Scroll all the way to the bottom to review the latest transactions.
Approving an EPAF

A department approver will receive an EPAF in their EPAF queue. In order to approve they can:

1. Enter “NOAAPSM” in Banner
2. Update the Transaction Status to “pending”
3. Update the Queue Status to “pending”
4. Click to review transactions pending approval
5. Select the PAF to review:
   a. Click “Tools”
   b. Click “Queue or Routing Information [NOAEPAF]”
   c. Click the “Transaction” tab
6. Review PAF - for direction on navigation, review **COMPLETING AND SUBMITTING AN EPAF**
7. Exit back to the NOAAPSM form
8. Approve EPAF by selecting “Approve” from the “Approver Action”

If your department EPAF approver is out on leave or vacation, you can contact HR to return your EPAF. This way, you can change the routing of your EPAF to be routed to a different approver and then resubmit. HR cannot override approvals.
Glossary

Alternative Identification
A tab on the SPIDEN form that allows users to link an employee’s G# to their Social Security Number (SSN).

It is essential that this step is completed so that others may query the person record using SSN in the future.

See also: III. COMPLETE SPIDEN RECORD FOR NEW PERSON

Applier
The “90 Level” approver selected under the Routing tab in the NOAEPAF form.

An HR Assistant should always be selected; however, the EPAF will ultimately be routed to the general HR queue and approved by the HR Assistant responsible for monitoring the queue throughout the day. Select the drop box icon to view available options.

See also: ENTER ROUTING AND SUBMIT TRANSACTION
Annual Salary
A field in the NOAEPAF form under the GENJBF. The Annual Salary is the amount the employee will be paid over the duration of the assignment. The employee will receive an equal portion of the “Annual Salary” each pay period over the number of pay periods they are paid over.

<table>
<thead>
<tr>
<th>Applied Status</th>
<th>Field Name</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Employee Class Code</td>
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<tr>
<td></td>
<td>Jobs Effective Date*</td>
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<td></td>
<td>Personnel Date</td>
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<tr>
<td></td>
<td>Job Begin Date*</td>
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<tr>
<td></td>
<td>Hours per Day</td>
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<td></td>
<td><strong>Annual Salary</strong></td>
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<td>Hours per Pay</td>
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<td>FTE</td>
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<td>Appointment Percent</td>
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<td>Pays</td>
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<td></td>
<td>Job Change Reason</td>
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<td>Contract Type</td>
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<tr>
<td></td>
<td>Salary Encumbrance</td>
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<td></td>
</tr>
</tbody>
</table>

Appointment Percent
For the purposes of positions established via EPAF, Appointment Percent will always default to 100 and cannot be changed.
Approval Category

Used to set-up an EPAF for a particular Position Type. According to the Approval Category selected, the EPAF will contain certain fields, values, or defaults necessary to establish the position correctly.

See also: **Determine Position Type, Position Prefix, and Approval Category**

Approval Type

Can be referred to as the different “screens” in an EPAF and can be used to navigate back and forth between “screens.” As you navigate through the EPAF, you will see that the Approval Type changes between “screens” and each Approval Type updates a different aspect of the employee or job.
Biographical
A tab on the SPAIDEN form used to complete the employee’s required information before being able to submit an EAPF.

See also **III. COMPLETE SPAIDEN RECORD FOR NEW PERSON**

Biweekly
Assignments that are paid every other Friday. In the context of non-benefitted or temporary employees, this includes only non-student wage, student wage, and work study positions.

Campus Code
A field in the NOAEPF under for the CHEMPL and CREMPL Approval Types. This should be updated for Original Hires and should be entered to reflect the work location of the employee. It is particularly important to update this field to “RM” if the employee is remote.

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Default Earnings</th>
<th>Job Labor Distribution</th>
<th>Routing</th>
<th>Other Information and Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TRANSACTION</strong></td>
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<td>Applied Status</td>
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<tr>
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<td>Employee Status</td>
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<td></td>
</tr>
<tr>
<td>P</td>
<td>Employee Class Code</td>
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<td>Home COAS</td>
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<td>Home Organization</td>
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<td>P</td>
<td>Distribution Orgn</td>
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<td>P</td>
<td>Campus Code</td>
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<tr>
<td>P</td>
<td>Current Hire Date</td>
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<tr>
<td>P</td>
<td>I9 Form Indicator</td>
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<td>P</td>
<td>I9 Date</td>
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<td>P</td>
<td>I9 Expiration Date</td>
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<td>P</td>
<td>Last Work Date</td>
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</tr>
<tr>
<td>P</td>
<td>Term Reason Code</td>
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</tr>
<tr>
<td>P</td>
<td>Termination Date</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*press LIST for valid codes.*
Tip: Highlight the “Campus Code” field and click ** under **New Value** for valid codes**

See also: **II. CREMPL – CREATE EMPLOYEE RECORD**

**Category Code**
The abbreviated description for **Approval Category**.
CHEMPL

The Approval Type code used on the Current Hire EAPF to change the employee record. Generally, nothing will need to be updated on this page for a Current Hire and EAPF submitters can continue on to complete the EAPF.

See also: II. CHEMPL – CHANGE EMPLOYEE RECORD

Contract Type

A field in the EAPF that establishes an employee’s job to either ‘P’ for Primary or ‘O’ for Overload. If the employee does not have a current Primary position in NBUILDST then ‘P’ would be entered. If the employee already has a Primary position, then ‘O’ for overload would be entered.
Create New
The action used to create a new person in Banner once it has been verified that the person does not already have an existing Banner record.

See also: II. GENERATE ID AND EVALUATE POTENTIAL MATCHES

CREMPL
The Approval Type code used on the Original Hire EPAF to establish a new employee record.

Example of an Original Hire on the CREMPL screen
See also: II. CREMPL – **Create Employee record**

**Current Hire**
An employee that has held a job or affiliate position at Mason, at some point in time.

See also: **Determine Original vs Current Hire**

**Current Hire Date**
A field in the NOAEPF form, generally only updated for an Original Hire on the CREMPL Approval Type screen. The Current Hire date should be the same as the Jobs Begin Date

**Current Identification**
A tab on the SPAIDEN form used to enter a new person’s name, prefix, and suffix (if applicable).

See also: III. **Complete SPAIDEN record for new person**
Current Value
A column in the NOAEPAF form that refers to the current information for that employee record or job record. Information will be under the Current Value under for the CHEMPL Approval Type but no information should appear under the Current Value for the CREMPL Approval Type. In addition, no information should appear under Current Value under the GENJBF Approval Type as position information should not exist yet for that particular Position Number/Suffix combination.

Example of a Current Hire on the CHEMPL Screen

Example of an Original Hire on the CREMPL Screen
**Distribution Organization**

A field in the NOAEP AF under for the CHEMPL and CREMPL Approval Types. The organization number should be entered here for Original Hires. This field does not affect how the assignment is paid or where it is paid.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Class Code*</td>
<td>AD</td>
<td></td>
</tr>
<tr>
<td>Home COAS*</td>
<td>1</td>
<td></td>
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<tr>
<td>Home Organization*</td>
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<td><strong>Distribution Orgn</strong></td>
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<tr>
<td>Campus Code*</td>
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<tr>
<td>Current Hire Date*</td>
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<td>I9 Form Indicator</td>
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<td>I9 Date</td>
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<td>I9 Expiration Date</td>
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<tr>
<td>Employee Status</td>
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<td>Last Work Date</td>
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<td>Term Reason Code</td>
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<tr>
<td>Termination Date</td>
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</tbody>
</table>

*field. Press LIST for valid codes.

See also: *II. CREMPL – CREATE EMPLOYEE RECORD*

**Early Termination**

An EPAF type used to terminate an assignment that already has a pre-existing end date in Banner.

See also: *EARLY TERMINATION EPAF*

**Emergency Contact**

A tab on the SPAIDEN form used to complete the employee’s Emergency Contact information.

See also: *III. COMPLETE SPAIDEN RECORD FOR NEW PERSON*
Employee Class Code
A field in the NOAEPAF form under the GENJB F Approval Type. The Employee Class Code is the abbreviation for Position Type; however, this field cannot be updated in NOAEPAF as it will default to the appropriate Employee Class once the EPAF is applied.

See also: **GENJBF – ENTER POSITION NUMBER/JOB INFORMATION**

Factor
A field in the NOAEPAF form under the GENJB F Approval Type. The factor refers to the number of pay periods between the Jobs Begin Date and the Jobs End Date for semi-monthly assignments. This value should always match Pays.
FTE

A field in the NOEPAF form under the GENJBF Approval Type. For positions submitted by EPAF, FTE is used to indicate the number of credits associated with a course. For instance, a 3-credit course during the Fall or Spring semester will have an FTE of .25. Please refer to the EPAF Field Requirements for additional guidance.

See also: GENJBF – ENTER POSITION NUMBER/JOB INFORMATION

Generate ID

The action used to create a G# for a new person in Banner by clicking . Once you have clicked “Generate ID,” you will be asked to further evaluate if person already has a G# in Banner in the GOAMTCH form.

See also: II. GENERATE ID AND EVALUATE POTENTIAL MATCHES
GENJBF
The Approval Type screen used to establish the begin date, salary, pay periods, hours per day, hours per pay, title, etc of an employee’s job.

<table>
<thead>
<tr>
<th>Applied Status</th>
<th>Field Name</th>
<th>Current Value</th>
<th>New Value</th>
<th>Rem</th>
</tr>
</thead>
<tbody>
<tr>
<td>P</td>
<td>Employee Class Code</td>
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<tr>
<td>P</td>
<td>Jobs Effective Date*</td>
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<tr>
<td>P</td>
<td>Personnel Date</td>
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<td>P</td>
<td>Job Begin Date*</td>
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<td>P</td>
<td>Hours per Day</td>
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<td>P</td>
<td>Annual Salary*</td>
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<td>Hours per Pay</td>
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<td>P</td>
<td>Title</td>
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<td></td>
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<tr>
<td>P</td>
<td>FTE</td>
<td></td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>Appointment Percent</td>
<td>100</td>
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<td></td>
</tr>
<tr>
<td>P</td>
<td>Factor</td>
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<td>1</td>
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</tr>
<tr>
<td>P</td>
<td>Pays</td>
<td></td>
<td>1</td>
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<tr>
<td>P</td>
<td>Job Change Reason</td>
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<td>RR</td>
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<tr>
<td>P</td>
<td>Contract Type</td>
<td></td>
<td>P</td>
<td></td>
</tr>
<tr>
<td>P</td>
<td>Salary Encumbrance</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

GOAMTCHE
The Banner form used to evaluate whether an employee’s information already exists in Banner before creating a new G# and person record.

See also: SPAIDEN - PERSON IDENTIFICATION SCREEN

Home Organization
A field in the NOEPAF under for the CHEMPL and CREMPL Approval Types. The organization number should be entered here for Original Hires and would be the same organization number as the Distribution Organization. This field does not affect how the assignment is paid or where it is paid.

See also: II. CREMPL – CREATE EMPLOYEE RECORD
Hours per Day
A field in the NOAEPAF form under the GENJBF Approval Type and should correlate to Hours per Pay. This does not necessarily used to indicate exactly how many hours per day the employee will work, since schedule vary. For direction on what hours to enter for each Position Type please see the EPAF Field Requirements.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours per Day</td>
<td></td>
</tr>
</tbody>
</table>

Hours per Pay
A field in the NOAEPAF form under the GENJBF Approval Type. The general number of hours an employee will work each pay period. For direction on what hours to enter for each Position Type please see the EPAF Field Requirements.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours per Pay</td>
<td></td>
</tr>
</tbody>
</table>

ID
The employee’s Social Security Number or G#, if known. The G# should always be used once the SPAIDEN record is identified or established.
Job Change Reason

A field in the NOAEPF form under the GENJBF and TERMJB Approval Types. The Job Change Reason is used to indicate the type of change or reason for change on the Jobs Begin Date and Jobs End Date. Job Change Reason codes default to the appropriate codes and generally do not need to be updated.

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Default Earnings</th>
<th>Job Labor Distribution</th>
<th>Routing</th>
<th>Other Information and Comments</th>
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<tbody>
<tr>
<td>Applied Status</td>
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<tr>
<td>Employee Class Code</td>
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<tr>
<td>Jobs Effective Date*</td>
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<tr>
<td>Salary Encumbrance</td>
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</table>

Jobs Effective Date

A field in the NOAEPF form under the GENJBF and TERMJB Approval Types. The Jobs Effective Date refers to either the job begin date or the job end date, depending on the Approval Type. Begin/end dates for semimonthly assignments should follow pay period dates. For more guidance on dates to use, please see the EPAF Field Requirements.
Jobs Begin Date
A field in the NOAEPF form under the GENJBF Approval Type. The begin date of the job. For semimonthly assignments, the Job Begin Date should be either the 10th or the 25th. For hourly wage assignments, it should be the first day of employment.

See also: TERMINATING AN ASSIGNMENT
Job Status
A field in the NOEPAF form under the TERMJB Approval Type. Job Status refers to whether the position is active or terminated. This will auto-populate with ‘T’ for termination on the termination screen and will insert a termination record on the end date entered. It cannot be changed.

MasonOnBoard
MasonOnBoard (masononboard.gmu.edu) is the system of record for hiring paperwork for all employees. A MasonOnBoard packet needs to be submitted by the EPAF Submitter for all new non-benefitted employees i.e. employees whose jobs are submitted via EPAF.

A MasonOnBoard packet will be submitted by Central HR for all benefitted employees, so the department should not submit a packet for these types of employees.

NBIJLST
A Banner form used to view a listing of an employee’s current jobs, Position Number/Suffix, and position begin and end dates.

See also: Determine Original vs Current Hire and Identify Next Available Position Number/Suffix Combination

NOAAPSM
A Banner form used to review EPAFs submitted or EPAF pending approval.

See also: Transactions Statuses and Approving an EPAF
NOEPAF

A Banner form used to create and submit, for approval, temporary, non-benefitted jobs for an employee.

Next Action

An action under the “Tools” menu in the NOEPAF form. The most common way to navigate through various Approval Types when completing an PAF.

See also: NAVIGATION SHORT CUTS
New Value
A column in the NOAEPAF form where data is entered by the EPAF submitter.

<table>
<thead>
<tr>
<th>Applied Status</th>
<th>Field Name</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
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<tbody>
<tr>
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<td></td>
<td>Jobs Effective Date*</td>
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<td>Personnel Date</td>
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<td></td>
<td>Job Begin Date*</td>
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<td>Appointment Percent</td>
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<td>Job Change Reason</td>
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<td>Contract Type</td>
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<td></td>
<td>Salary Encumbrance</td>
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</tbody>
</table>

Organization Code
A field in the Pooled Position Lookup that is used to look-up available positions tied to the appropriate organization code from which the employee should be paid.

Pooled Position Lookup Results

To view the types of positions available and their usage, select Position Descriptions.

<table>
<thead>
<tr>
<th>Fund/Org for the given position number</th>
<th>Organization Code: XXXXXX</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund Code</td>
<td>12345</td>
</tr>
</tbody>
</table>

Pooled Position and code

- **Academic Year Faculty Positions:**
  - FV Faculty Overload
  - PC Faculty Miscellaneous Pay
  - PO Adjunct Faculty Teaching

- **Academic Year Graduate Assistant Positions:**
  - GA Graduate Teaching Assistants
  - GR Graduate Research Assistants
  - GL Graduate Lecturer
  - GP Graduate Professional Assistants
  - GP
  - RA Resident Assistants

- **Summer Session Positions:**
  - SR Summer Faculty Research
  - SF Summer Faculty Teaching
  - SP Summer Adjunct Faculty
  - GS Summer Graduate Teaching Asst.

- **Hourly Wage Positions:**
  - WG Non-Student Wage
  - WC Work Study
Original Hire
An employee that has never had a job or affiliate position at Mason.

See also: *Determine Original Vs Current Hire*

Other Information and Comments
A tab on the NOAEPF form that can be used to enter any additional information about the nature of the work, duties, fund information, timesheet approvers, etc.

See also: *Other Information and Comments*

Patriot Web Self-Service
patriotweb.gmu.edu
A self-service site where the Pooled Position Lookup is located. It can also be used to review and/or update personal information, approve/submit timesheets, update direct deposit and tax information, review salary information and employment history, retrieve your W-2, etc.

Pays
A field in the NOAEPF form under the GENJBF Approval Type. The Pays refers to the number of pay periods between the Jobs Begin Date and the Jobs End Date for semi-monthly assignments. This value should always match Factor.
Personnel Date
A field in the NOAEPF form under the GENJBF Approval Type. The Personnel Date is generally used to indicate the true begin date for an employee. For instance, GAs typically start on 8/25, but if they started actually work on 9/1, you can put this in personnel date.

Pooled Position Lookup
The Pooled Position Lookup is used to identify the appropriate Position Number according to the Position Type and Organization Code the employee will be paid from.

See also: POOLED POSITION LOOKUP
Position Number
A Position Number is used to set-up a job for an employee. There are two elements of a Position Number that include the 1) **Position Prefix**, according to the appropriate **Position Type** and 2) proceeding number/letter combination which is linked to the organization in which the employee will be paid. The Position Number will be queried in the **Pooled Position Lookup** and will be entered in the **NOEPAF** form under the **GENJBF Approval Type**.

See also: **Pooled Position Lookup**

Position Prefix
A Position Prefix refers to the first two letters in a Position Number. A Position Prefix is used to indicate the **Position Type** and, in some cases, specifically indicates the type of duties of the position ex. an overload assignment for teaching faculty, summer adjunct, summer research, etc.

See also: **Determine Position Type, Position Prefix, and Approval Category**

Position Type
Refers to the kind of position an employee will hold ie. adjunct, student wage, graduate research assistant, etc.

See also: **Determine Position Type, Position Prefix, and Approval Category**

Query Date
A field in the **NOEPAF** form under the **GENJBF Approval Type**
Regular Rate
A field in the NOAEPF form under the GENJBF Approval Type

<table>
<thead>
<tr>
<th>Applied Status</th>
<th>Field Name</th>
<th>Current Value</th>
<th>New Value</th>
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<tbody>
<tr>
<td>P</td>
<td>Employee Class Code</td>
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<tr>
<td>P</td>
<td>Jobs Effective Date*</td>
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<td>P</td>
<td>Personnel Date</td>
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<td>P</td>
<td>Job Begin Date*</td>
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<td>Timesheet Orgn*</td>
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<td>Hours per Day</td>
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<td>P</td>
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<td>P</td>
<td>Salary Encumbrance</td>
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<td>P</td>
<td>Time Entry Method</td>
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</tbody>
</table>

Returned for Correction
An EAPF will be Returned for Correction if certain requirements are inconsistent or inaccurate. If your transaction status is in “Returned for Correction,” you will need to review the EAPF comment and correct as necessary, then resubmit.

See also: Transactions Statuses and Returned for Correction Reasons Explained

Required Approver
Refers to the approver within the department/unit. The approver’s Net ID can be entered or the approver can be selected from the drop-down. An approver must have Banner access to approve EAPFs. If your department EAPF approver is out on leave or vacation, you can contact HR to return your EAPF. This way, you can change the routing of your EAPF to be routed to a different approver and then resubmit. HR cannot override approvals.
Routing
A tab on the NOEPAF form where the Required Approver and Applier is entered. If your EPAF needs to be approved by additional approvers such as Financial Aid, Provost, or OSP, additional routing will be automatically inserted upon submission.

Salary Encumbrance
A field in the NOEPAF form under the GENJBF Approval Type. This field will automatically populate and cannot be changed.

Select ID
When a match is conclusive in the GOAMTCH form, Select ID is the action to continue with the existing SPAIDEN record. Match is conclusive if 1) SSN and first name match OR 2) First name, Last name, and DOB match.

Semimonthly
Assignments that are paid on the 1st and 16th of the month, except when it falls on a weekend or holiday, otherwise it will be paid on the business day proceeding. In some cases, the first check of the fiscal year may be paid later. See http://hr.gmu.edu/time/schedule/
SPAIDEN
A Banner form used to search an existing Banner record or create a new Banner record for an employee.

Student Wage
A part time employee that is degree-seeking. An employee qualifies as a student worker if they degree-seeking ungraduate or graduate student. If an employee is considered a student, they must be classified as student wage. Once they are no longer a student, their assignment must be changed to wage by terminating the current position and entering a new one. If a student is working during the summer months and is enrolled for the fall, you may leave their position classification as student wage. To verify whether an employee is a student, you will need to contact the registrar’s office.

Suffix
A field in the NOAEPAP form under the GENJBF Approval Type. The suffix is used to differentiate Position Numbers when the Position Number sequence has already been used previously for an employee.

TERMJB
The Approval Type screen used to enter the Jobs End Date.

<table>
<thead>
<tr>
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<th>Field Name</th>
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<tbody>
<tr>
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<td>P</td>
<td>Job Change Reason*</td>
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<td>CA</td>
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</table>

* indicates a required field.
**Time Entry Method**

A field in the NOEPAF form under the GENJBF Approval Type. This field is used for hourly positions wherein the employee will fill out a timesheet. It defaults to “Web Time Entry” and generally does not need to be updated. In rare instances, this will need to be updated to “Department Time Entry” for specific departments that fill out time for their employees if they have a time-clock system.

<table>
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<td>Time Entry Method</td>
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**Timesheet Orgn**

A field in the NOEPAF form under the GENJBF Approval Type

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<tr>
<td>P</td>
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</table>
Title
A field in the NOAEPF form under the GENJBF Approval Type

For adjuncts, enter the class title, course number, and course section. For other employment types, it is recommended you use a brief but useful 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 Number
A Transaction Number is populate when you begin an EPAF. It is important to make note of the transaction number so that you may refer back to the EPAF.

Transaction Status
The status of the EPAF.

See also: Transactions Statuses

Wage
A broad term used for all non-student wage, student wage, and work study Position Types. Wage positions are paid on an hourly basis and employees must complete timesheets to be paid.