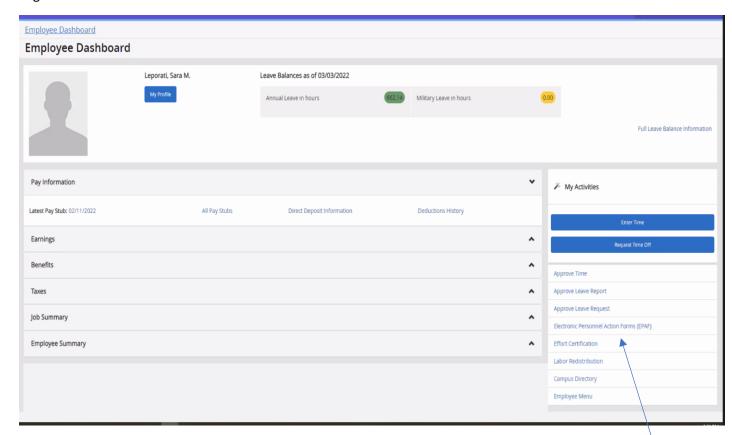
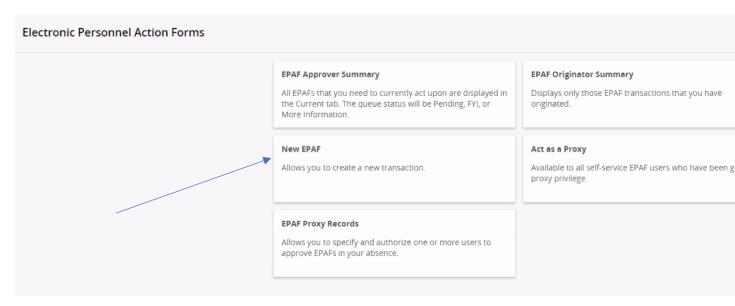
How to hire a brand new Graduate Assistant (hourly):

These are the step-by-step instructions for completing the EPAF to hire a <u>NEW GRAD ASSISTANT</u> who will be paid an <u>hourly rate</u> and be <u>required to submit an hourly time sheet</u> for payment.

Log into to Banner Self Service and click on Electronic Personnel Action Forms.



Go to New EPAF



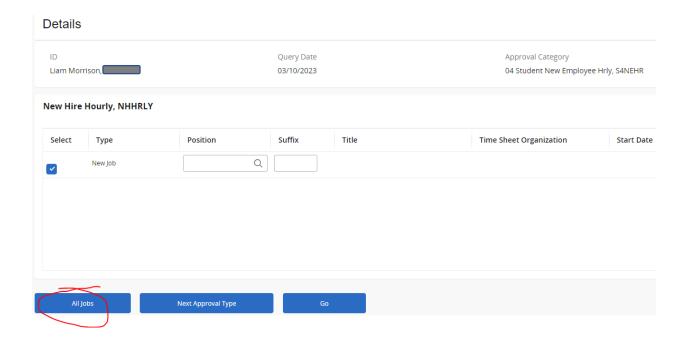
Enter the student's CWID number or search by name.



Select the person.

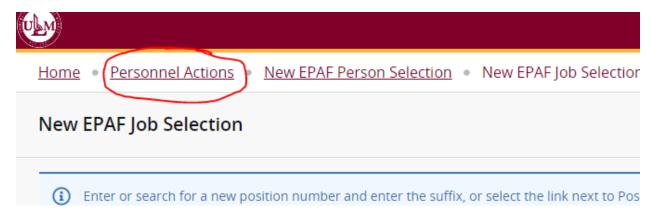
The **VERY FIRST THING** you want to do is **check the person's job history**. This will help you confirm which EPAF you will need to use to hire them (the "New Employee" or the "Reopen" EPAF). Since, in this first step, we are not actually starting the EPAF yet, we just want to *advance to the next screen* to check their job history, select any EPAF (it doesn't matter which one) from the dropdown box, just to have *something* in that field, and click "GO."

On the next page, click on "All Jobs" to view the person's employment history:



If the person has <u>no</u> job history of being a **Graduate Assistant**, you will use the <u>Graduate Asst New Empl Hourly</u> EPAF to hire them. If their job history shows they have been in a Graduate Assistant position before, they are <u>not</u> a new GA and you will need to select the appropriate EPAF to "Reopen" their old GA position. Please refer to the "Student/GA EPAF Guidelines" to help you determine the appropriate course of action.

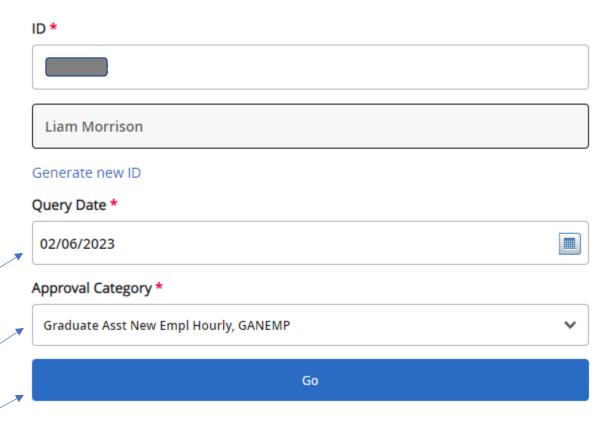
Once you have determined that this person has never been a Grad. Assistant before and you need to hire them as a <u>brand new GA</u>, return to the EPAF menu by clicking the "Personnel Actions" tab at the top of the page and then click on the menu button "New EPAF."



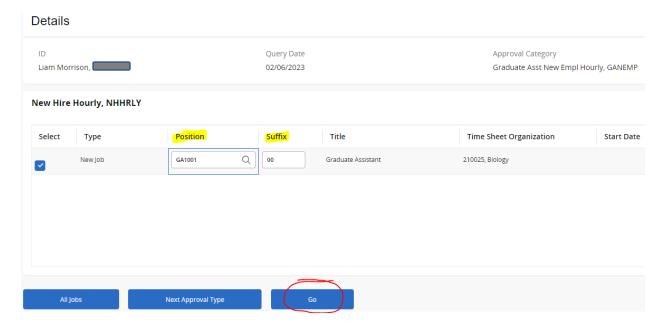
This will bring you back to the original screen for starting an EPAF.

Follow these next steps carefully:

- 1. Enter the student's CWID #.
- 2. **Update the query date to be the new GA's 1**st day of work. This is important! Query dates must be entered in the MM/DD/YYYY format.
- 3. Select "Graduate Asst New Empl Hourly" as the approval category and click "Go."



Using ALL CAPS, enter the position number GA1001 and the suffix number 00 and click "Go."



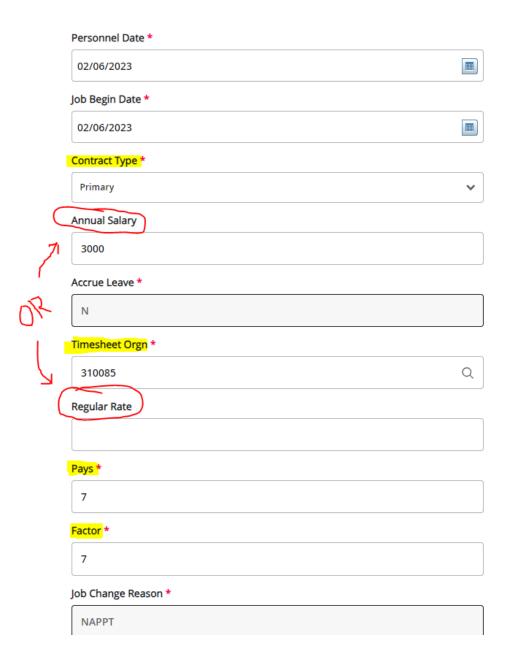
On the next screen, you will create the GA's employee record. The fields with red asterisks (*) are required. You should have used the GA's first day of work as the query date, so that date will autopopulate in as the Current Hire Date. Select the Location Code. (Please note that the screenshots provided in this guide are **EXAMPLES ONLY**. The data you enter in EPAF will be based on your own hiring department and the employee's situation.)

Create/Change Employee Record **Home Organization** 310085 Q Current Hire Date * Go ahead and enter the GA's Home Org and the 02/06/2023 Location Code. Campus Code * M Location Code * HOUSE, Residential Housing College Code 00 Scroll down the page to continue entering Employee Class Code * information. Employee Status * Home COAS * M

The GA's Job Effective Date, Personnel Date, and Job Begin Date will all auto-populate from the **Query Date** you entered. All 3 should be the **GA's hire date**. If you need to revise the hire date to a different date than what you entered as the Query Date, you will need to start over from the beginning and revise the Query Date; otherwise, you will likely get errors and not be able to submit your EPAF.

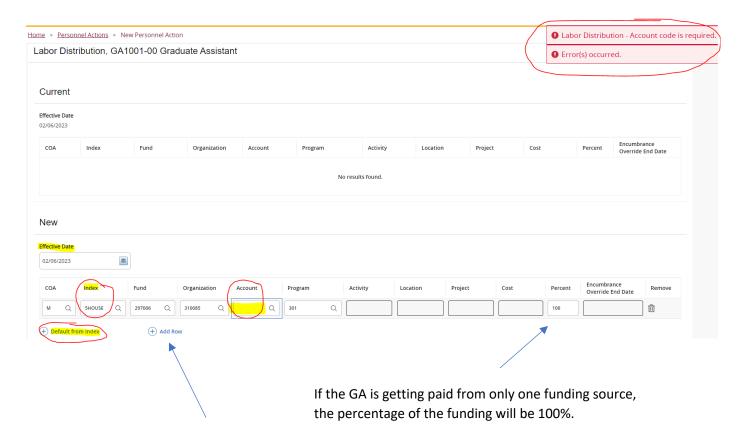
For Contract Type, select "Primary" since this is the new GA's primary job. Enter the timesheet org.

- * Enter either the total amount of the GA's assistantship (SALARY) **OR** their hourly rate (REGULAR RATE). Both fields are not required; either one will do. If you enter the assistantship amount, Banner will calculate the GA's hourly rate based on a 20-hour work week.
- * Enter the # of payrolls in the semester that the GA will receive payment in the "Factor" and "Pay" fields. Payroll calendars are located on the HR/Payroll website https://www.ulm.edu/hr/payroll.html. The last 3 fields are non-enterable. You can skip those.



Scroll down to the "Labor Distribution" section to enter the funding source:

Verify the Effective Date under "New" is correct. (FYI – "Current" refers to their most recent GA record in payroll. Since this is a brand new GA, a payroll record for this position doesn't exist yet, so there will be no information under "Current.") Enter the Index code from which you will pay your GA and then click "Default from Index." The fund, org # and program will then automatically populate. You will immediately receive a red message in the upper right corner telling you that an Account number is required. Enter 601170, which is the account number used for Graduate Assistants.



If the GA will be paid from 2 or more funds, click "Add Row" to add another source of funding, and then you can enter the correct percentage for each fund.

Scroll down further to enter the Termination of Job information:

Termination of Job. GA1001-00 Graduate Assistant



Next fill out the routing queue.

At minimum, the EPAF routing queue <u>must</u> contain the following levels: Director/Dean, Graduate Office, HR Staffing Specialist, Payroll, Student Accounts, Dean of Grad School, and HR Apply. DO NOT DELETE any of these levels from the routing queue. DO NOT CHANGE THE REQUIRED ACTION of any of these levels in the routing queue. All parties in the routing queue are preset to APPROVE, except Students Accounts is preset for "FYI" and the HR Apply level is preset to APPLY the EPAF into the payroll. These *Required Actions* should never be changed.

In the **User Name** dropdown box next to each Approval Level, select the appropriate people to approve the EPAF:

For the **Director/Dean** level, select your department's budget head who will approve the hiring and the funding.

For the **HR Staffing Specialist** level, select the appropriate HR Staffing Specialist. Currently, **Jenny Jones** is the Staffing Specialist for all Grad Assistants.

For the **Payroll** level, select the appropriate Payroll Analyst according to the student's last name: Currently, Jackie Sias is the payroll analyst for last names A-F, Felicia Gibson has G-M. For last names beginning with N-Z, please select <u>Felicia Gibson for letters N, O, and T-Z</u>, and select <u>Jackie Sias for letters P-S</u>.

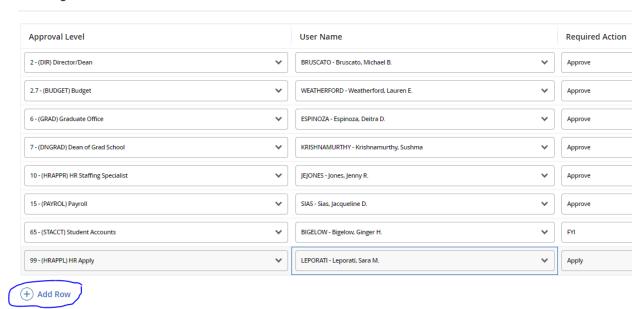
For **HR Apply**, select Leporati.

Complete the remaining routing queue, and if your EPAF needs additional approvals, such as approval from Grants & Contracts or from a Project PI (budget manager of a grant), you can simply click "Add Row" and select the appropriate approval levels you need to add to the EPAF's routing queue, select the appropriate person to approve at that level, and select "Approve" as their Required Action.

Each approver in the routing queue should carefully review the PAF for accuracy before approving. If something is not correct on the PAF, the approver should add a comment explaining what needs to be

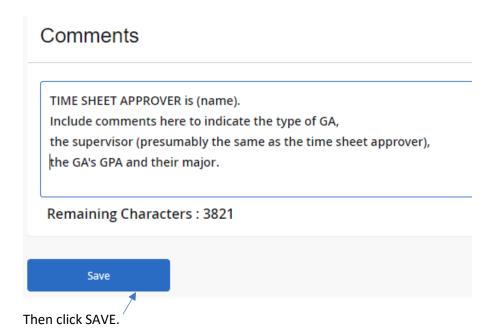
addressed and click "**Return for Correction**" to send the PAF back to the originator to correct and resubmit for approval.

Routing Queue

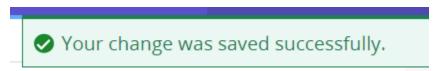


ADD A COMMENT to indicate who the GA's <u>TIME SHEET APPROVER</u> will be. Since this GA is paid hourly, a time sheet is required.

- ***Also the Grad School requests that you add a comment to provide the following information for the Grad student you are hiring:
 - 1. Type of GA (ie: RA, TA, or AGA)
 - 2. The GA's Supervisor
 - 3. The Grad student's GPA
 - 4. The Grad student's major



If there were no errors that Banner would recognize (ie: missing information in required fields, dates entered in the wrong format, etc...), then you should receive a message in the top right corner of your screen that your changes were saved successfully:



If you receive WARNING messages, that is **OKAY!** All EPAFs will having Warning messages. However, if you receive an ERROR message, you must resolve it before you will be able to Submit the EPAF successfully.



Click Submit and you should receive a confirmation message that the PAF was submitted:



DONE!

A NOTE ABOUT EPAF DEADLINES:

See the most up-to-date payroll calendar posted on the Payroll website for EPAF DEADLINES. The

| EPAF must be approved by all approvers in the routing queue and be <u>Pending "HR APPLY"</u> by the EPAF <u>Deadline</u> to be applied to that payroll. |
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