

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

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

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

The screenshot displays the Banner Self Service Employee Dashboard for Sara M. Leporati. The dashboard includes a profile section with a 'My Profile' button, leave balances as of 03/03/2022 (Annual Leave: 962.14, Military Leave: 0.00), and a 'Full Leave Balance Information' link. The main content area is divided into two columns. The left column contains a list of menu items: Pay Information (expanded to show Latest Pay Stub: 02/11/2022, All Pay Stubs, Direct Deposit Information, and Deductions History), Earnings, Benefits, Taxes, Job Summary, and Employee Summary. The right column, titled 'My Activities', contains several buttons and links: Enter Time, Request Time Off, Approve Time, Approve Leave Report, Approve Leave Request, Electronic Personnel Action Forms (EPAF) (highlighted with a blue arrow), Effort Certification, Labor Redistribution, Campus Directory, and Employee Menu.

Go to New EPAF

Electronic Personnel Action Forms

EPAF Approver Summary

All EPAFs that you need to currently act upon are displayed in the Current tab. The queue status will be Pending, FYI, or More Information.

EPAF Originator Summary

Displays only those EPAF transactions that you have originated.

New EPAF

Allows you to create a new transaction.

Act as a Proxy

Available to all self-service EPAF users who have been granted proxy privilege.

EPAF Proxy Records

Allows you to specify and authorize one or more users to approve EPAFs in your absence.

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

New EPAF Person Selection

Check the box to limit to search an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

First Name	Last Name	<input type="checkbox"/> is an employee	or	ID	or	SSN/SIN/TIN	<input type="button" value="Search"/>
<input type="text" value="liam"/>	<input type="text" value="morrison"/>			<input type="text"/>		<input type="text"/>	

Enter or Generate New ID

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:

Details

ID	Query Date	Approval Category
Liam Morrison, [REDACTED]	03/10/2023	04 Student New Employee Hrly, S4NEHR


New Hire Hourly, NHHRLY

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input checked="" type="checkbox"/>	New Job	<input type="text"/>	<input type="text"/>			

[All Jobs](#) [Next Approval Type](#) [Go](#)


If the person has no job history of being a **Graduate Assistant**, you will use the Graduate Asst New Empl Hourly EPAF to hire them. If their job history shows they have been in a Graduate Assistant position before, they are *not* 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 brand new GA, 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.”



[Home](#) • [Personnel Actions](#) • [New EPAF Person Selection](#) • [New EPAF Job Selector](#)

New EPAF Job Selection

 Enter or search for a new position number and enter the suffix, or select the link next to Pos

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 1st 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."

ID *

Liam Morrison

[Generate new ID](#)

Query Date *

02/06/2023 

Approval Category *

Graduate Asst New Empl Hourly, GANEMP 

Go

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

Details

ID	Query Date	Approval Category
Liam Morrison, <input type="text"/>	02/06/2023	Graduate Asst New Empl Hourly, GANEMP

New Hire Hourly, NHHRLY

Select	Type	Position	Suffix	Title	Time Sheet Organization	Start Date
<input checked="" type="checkbox"/>	New Job	<input type="text" value="GA1001"/>	<input type="text" value="00"/>	Graduate Assistant	210025, Biology	

[All Jobs](#) [Next Approval Type](#) [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 auto-populate 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



Current Hire Date *

02/06/2023



Campus Code *

M

Location Code *

HOUSE, Residential Housing



College Code

00

Employee Class Code *

16

Employee Status *

A

Home COAS *

M

Go ahead and enter the GA's Home Org and the Location Code.

Scroll down the page to continue entering information.

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.

Personnel Date *

Job Begin Date *

Contract Type *

Annual Salary

OR

Accrue Leave *

Timesheet Orgn *

Regular Rate

Pays *

Factor *

Job Change Reason *

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.

Home » Personnel Actions » New Personnel Action

Labor Distribution, GA1001-00 Graduate Assistant

Current

Effective Date
02/06/2023

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
No results found.											

New

Effective Date
02/06/2023

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
M	SHOUSE	297006	310085		301					100		

+ Default from Index + Add Row

If the GA is getting paid from only one funding source, the percentage of the funding will be 100%.

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

Jobs Effective Date *

05/12/2023

Personnel Date

05/12/2023

Job Change Reason

DETEN

Job Status

T

This is the **Termination record**.

Enter the GA's **last day of work** in the "Jobs Effective Date" field. (You may need to click on the calendar icon.)

Use the same date as the "Personnel Date."

Next fill out the routing queue.

At minimum, the EPAF routing queue must 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 Felicia Gibson for letters N, O, and T-Z, and select Jackie Sias for letters P-S.

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

Approval Level	User Name	Required Action
2 - (DIR) Director/Dean	BRUSCATO - Bruscato, Michael B.	Approve
2.7 - (BUDGET) Budget	WEATHERFORD - Weatherford, Lauren E.	Approve
6 - (GRAD) Graduate Office	ESPINOZA - Espinoza, Deitra D.	Approve
7 - (DNGRAD) Dean of Grad School	KRISHNAMURTHY - Krishnamurthy, Sushma	Approve
10 - (HRAPPR) HR Staffing Specialist	JEJONES - Jones, Jenny R.	Approve
15 - (PAYROL) Payroll	SIAS - Sias, Jacqueline D.	Approve
65 - (STACCT) Student Accounts	BIGELOW - Bigelow, Ginger H.	FYI
99 - (HRAPPL) HR Apply	LEPORATI - Leporati, Sara M.	Apply

 + Add Row

ADD A COMMENT to indicate who the GA’s TIME SHEET APPROVER 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

Comments

TIME SHEET APPROVER is (name).
Include comments here to indicate the type of GA,
the supervisor (presumably the same as the time sheet approver),
the GA's GPA and their major.

Remaining Characters : 3821

Save

Then click SAVE.

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:

✓ Your change was saved successfully.

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

Delete

Save

Submit

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

✓ The transaction has been successfully 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 *Pending "HR APPLY"* by the EPAF Deadline to be applied to that payroll.