

Graduate Assistant EPAF Instructions

Banner Links: <https://my.bsu.edu>

- SSB – Self-Service Banner
- Employee → Electronic Personnel Action Form → New EPAF

Enter Student ID – Enter. If student is in the Banner system, the name will populate.

(If student name does not populate, the student info is not in Banner – e-mail Graduate School)

QUERY DATE: Use the first day of the payroll period in which the student will work (See table below). **Please note: This date cannot be edited later! If entered incorrectly, you will have to void the EPAF.**

<u>Academic Year 2021-2022</u>
Query Date: 08/22/2021 (19 pay periods)
<u>Fall Semester 2021</u>
Query Date: 08/22/2021 (9 pay periods)
<u>Spring Semester 2022</u>
Query Date: 01/09/2022 (9 pay periods)

Approval Category: -Graduate Assistant-New Stipend Hire **(Select the Correct Term)**, G120

NEW: Please select the appropriate template for the term

The screenshot shows a web form for entering an ID and selecting a link. The 'Approval Category' field is highlighted in red, indicating it is required. A dropdown menu is open, showing a list of options for the Approval Category. The selected option is 'GA-Graduate Assistant-New Stipend Hire Spring, G120SP'. Other options include 'GA-Graduate Assistant-New Stipend Hire, GA120', 'GA-Graduate Assistant-New Stipend Hire Summer Full, G120SF', 'GA-Graduate Assistant-New Stipend Hire Summer 1, G120S1', 'GA-Graduate Assistant-New Stipend Hire Summer 2, G120S2', 'GA-Graduate Assistant-New Stipend Hire Annual Year, G120AY', and 'GA-Graduate Assistant-New Stipend Hire Fall, G120FA'. The 'Go' button is visible below the dropdown. At the bottom of the form, there are links for 'EPAF Approver Summary' and 'EPAF Originator Summary'.

“GO”

Position Selection:

*Be sure the position is for a GA and is appropriate for the account (If you are unsure, Payroll can assist, 5-8461 or peb@bsu.edu). To look up position number:

https://www.bsu.edu/about/administrativeoffices/humanresources/forms-policies-guides/system-guides/banner-epaf-user-guide#accordion_positionnumberguidance

- To search: Click Ctrl+F, Enter Organization number in search box
- Find Graduate Assistant position S3 with 00 suffix

Enter this position number on EPAF

Suffix: 00 (there must be 2-00's otherwise the EPAF will not process correctly)

“GO”

Employee Information (some items are not enterable)

Employee Type/Class: S3

Employee Status: Active

Home Department COA: 1

Home Department: Budget Organization Number for **who is paying**

Distribution COA: 1

Distribution Orgn: Budget Organization Number for where the student **will work** (This controls who has access to the timecard in Kronos)

Current Hire Date: Use date showing in Current Value Column. Use Query Date, if brand new only.

FT/PT Status: Select from drop down menu

Full Time = 20 hours per week Part Time = 10 hours per week

IPEDS Primary Function: Enter Code from below that matches GA Occupational Category of Work. The only two options are below. Do not enter any other IPED than GAR or GAT. If the Graduate Assistant is not teaching/tutoring students, grading, holding office hours for student instruction, or instructing students in some manner, they should be categorized as GAR.

EPAF Code:	Description:
GAT	Teaching
GAR	Research

Employee info

Item	Current Value	New Value
Employee Type/Class: *(Not Enterable)	S1, Student Undergrad Hourly	<input type="text" value="S3"/>
Employee Status: *(Not Enterable)	Active	<input type="text" value="A"/>
Home Department COA: *(Not Enterable)	1	<input type="text" value="1"/>
Home Department: *	174010, Office of Dean of Graduate School	<input type="text" value="174010"/>
Distribution COA: *(Not Enterable)	1	<input type="text" value="1"/>
Distribution Orgn: *	174010, Office of Dean of Graduate School	<input type="text" value="174010"/>
Current Hire Date: MM/DD/YYYY*	02/12/2019	<input type="text"/>
FT/PT Status: *	Part Time	<input type="text" value="Full Time"/>
IPEDS Prim Function: *	N	<input type="text" value="GAR"/>

Student Stipend Job Info

Job Begin Date: **IF** there is a date in the “Current Value” column, **you must carry over the same date in this field ONLY**. If there is no “Current Value”, use the query date.

- At times, the “Current Value” column will not appear until submission. If you get error messages regarding dates – check this field first, correct, and resubmit.

PAF Effective Date: **NEW: These dates will auto-populate if you selected the right template, do not change this date.**

Personnel Date: **NEW: These dates will auto-populate if you selected the right template, do not change this date.**

Job Type: will default, leave as is. If the student has a current job, enter secondary (may have more than one secondary). You do not need to notify the Grad School when this happens.

FTE: 1

Step: 0

Annual Salary: Enter the **actual** stipend – do not include “,” or “\$”. You may use decimals.

Factor: **NEW: This number will auto-populate if you selected the right template, do not change**

Job Status: Active

Job Change Reason: NEWHR, New Hire

Supervisor ID: You may enter the supervisor’s id but this is not required.

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		<input type="text" value="08/12/2018"/>
PAF Effective Date: MM/DD/YYYY*		<input type="text" value="08/12/2018"/>
Personnel Date: MM/DD/YYYY*		<input type="text" value="08/12/2018"/>
Job Type (P, S, O): *		<input type="text" value="Primary"/>
FTE: *(Not Enterable)		<input type="text" value="1"/>
Step: (Not Enterable)		<input type="text" value="0"/>
Annual Salary: *		<input type="text" value="11000"/>
Factor: *		<input type="text" value="19"/>
Number of Pays: *		<input type="text" value="19"/>
Job Status: *(Not Enterable)		<input type="text" value="A"/>
Job Change Reason: *(Not Enterable)		<input type="text" value="NEWHR"/>

Labor Distribution

Will default for that position number.

End a Job Assignment

PAF Effective Date and Personnel Date: **NEW: These dates will auto-populate if you selected the right template, do not change these dates**

Job Change Reason: ENDJB, End of Job Assignment

Job Status: Terminated

End a job assignment, 999975-00 Grad Stipend (100100), Last Paid Date: Jun 02, 2018

Item	Current Value	New Value
PAF Effective Date: MM/DD/YYYY*		<input type="text" value="05/04/2019"/>
Personnel Date: MM/DD/YYYY*		<input type="text" value="05/04/2019"/>
Job Change Reason: *		<input type="text" value="ENDJB, End of Job Assignment"/>
Job Status: *		<input type="text" value="Terminated"/>

Routing Queue –

Use drop down boxes to choose department approvers and magnifying glass to choose individuals. **You must have at least one approver from your department.**

Feel free to use the “FYI” option instead of “Approve” for department approvers as appropriate (this will expedite the process for many departments).

For those entering GA’s in the colleges, please add your college Director of Finance and Budgets as an **approver**. (Unless your college has provided instructions otherwise.)

If GA is being paid from a grant account, please include your grant specialist as an **approver**.

For “630 – (GRAD) GA First Level Approval,” please select Courtney Quinn with Required action: Approve

For “635 – (GRAD) GA Second Level Approval,” please select Michelle Miller with Required action: Approve

Leave Payroll: Use magnifying glass to choose Shana Rogers, to “Apply”

Approval Level	User Name	Required Action
630 - (GRAD) GA First Level Approval	<input type="text" value="Q"/>	Approve
635 - (GRAD2) GA Second Level Approval	<input type="text" value="Q"/>	Approve
900 - (PAYRLL) Payroll	<input type="text" value="Q"/>	Apply
Not Selected	<input type="text" value="Q"/>	Not Selected
Not Selected	<input type="text" value="Q"/>	Not Selected
Not Selected	<input type="text" value="Q"/>	Not Selected
Not Selected	<input type="text" value="Q"/>	Not Selected

Save and Add New Rows

Comment

You may list any other necessary information that needs communicated.

SAVE and SUBMIT

Errors: You may receive warnings or error messages. Some will allow submission and some will not.

- *Warning* Encumbrance Method is Value Input ... (ignore this message)
- Date Errors: Check the “Job Begin Date”, as well as all other date fields
- First Name, SSN/SIN or Birth Date are incomplete, or Sex Code is invalid... (E-mail gradschool@bsu.edu with BSU ID number of student and we will fix the error)
- *Error* This employee already has a primary job...(Select Secondary)

After making changes, **SAVE and SUBMIT** again.

You will receive a confirmation of successful submission if indeed it was submitted.

NEXT: Notify Approvers that EPAF is in their queue ***except for Courtney and Michelle***

When there are changes:

Must be “Returned for Correction” by next approver.

Go to: Originator Summary → Update. Make Changes. Double check approvers – Change to FYI if appropriate. SAVE and SUBMIT. Notify approvers (except for Courtney and Michelle)

TO SET UP A PROXY:

1. Approver logs in to SSB → Employee → Electronic Personnel Action Form
2. “EPAF Proxy Records”
3. Select Person who will be proxy and select “Add”, then Save
4. Proxy will login to SSB → Employee → Electronic Personnel Action Form
5. “Act as a Proxy”
6. Proxy For – Chose Person in drop down menu, then GO

Cancelling an Assistantship:

1. Email Payroll (peb@bsu.edu) immediately with the student’s name and ID, so that they can remove the GA EPAF end date. (If you do not notify Payroll, you risk the possibility of the student having to pay back the University, this is not something that should ever happen. It is very confusing and difficult to explain to students why they must pay back the University. This happens A LOT at the end of the Fall Semester).
2. Enter the ADM400-In the comment section, please indicate the reasoning for termination.
 - a. For those removing assistantships in the colleges, please add your college Director of Finance and Budgets as an FYI (unless otherwise directed by college).
 - b. **Approval Queues: Courtney Quinn at the 630, GA Level with Approval and Michelle Miller at the 890 – HR FYI Level.**

Additional Pay (one-time or on-going): You cannot use the exact same position number. At the minimum, you have to use a different suffix on the position, usually -01. If you use the same position

and suffix, the student will not be paid correctly. If it is a teaching assignment, Payroll can set up a GA position that is tagged as teaching, when in doubt, call Payroll.

Miscellaneous Pay (one-time payment): Complete a STU115 that gets sent directly to Payroll – no EPAF sent to Grad School.

CONTACTS:

Position Numbers and Payroll Info: Payroll, peb@bsu.edu or 5-8461

GA EPAF and Assistantship Questions: Courtney Quinn, gradschool@bsu.edu or 5-1301

Michelle Miller, mkhancock@bsu.edu or 5-1316

Revised: 06/21/2021