

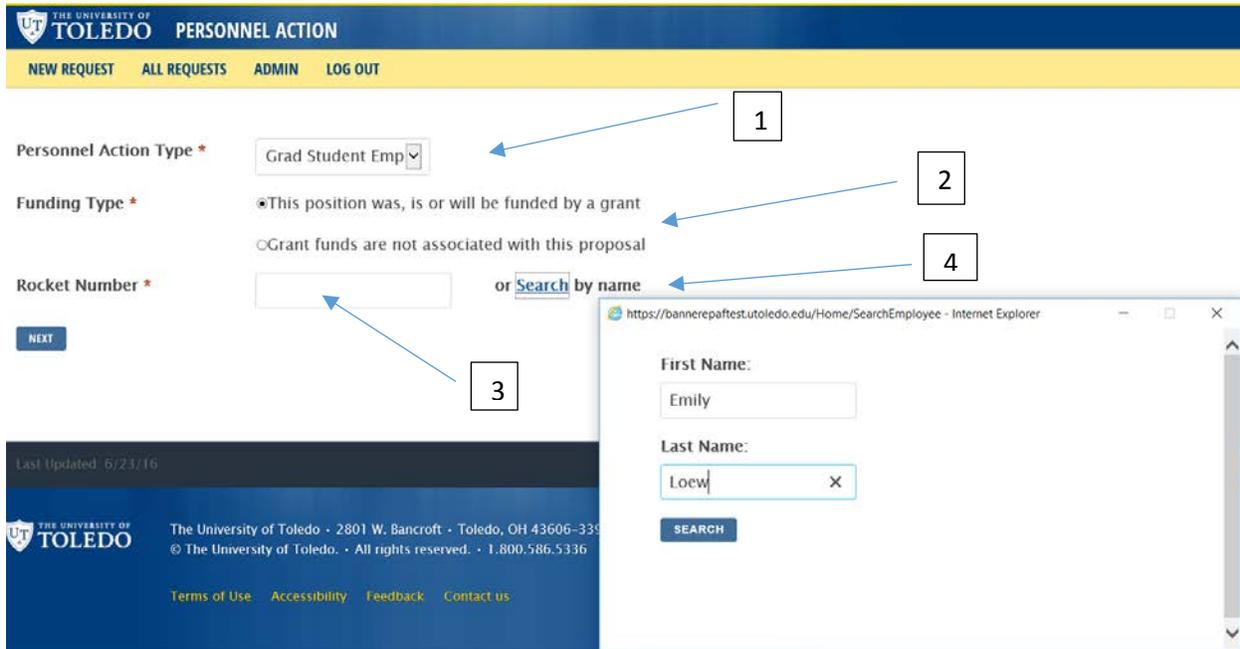
New Hire for Graduate Students – student has not worked for the University in any capacity

Step One: Electronic Personnel Action Form (ePAF) Screen

1. Select Personnel Action Type
2. Select funding type:
 - a. This position was, is or will be funded by a grant
 - b. Grant funds are not associated with this proposal – no funding from a grant

Note: If student is to receive any type of grant funding, such as stipend, general fees, health insurance, etc., select 2a. This will generate an email to the originator asking for information about the grant, which will be forwarded to Grants Accounting and Research and Sponsored Programs.

3. Enter Rocket ID of student (must enter capital R); name will populate if student is admitted in Banner
4. Use Search link if student's ID is not available

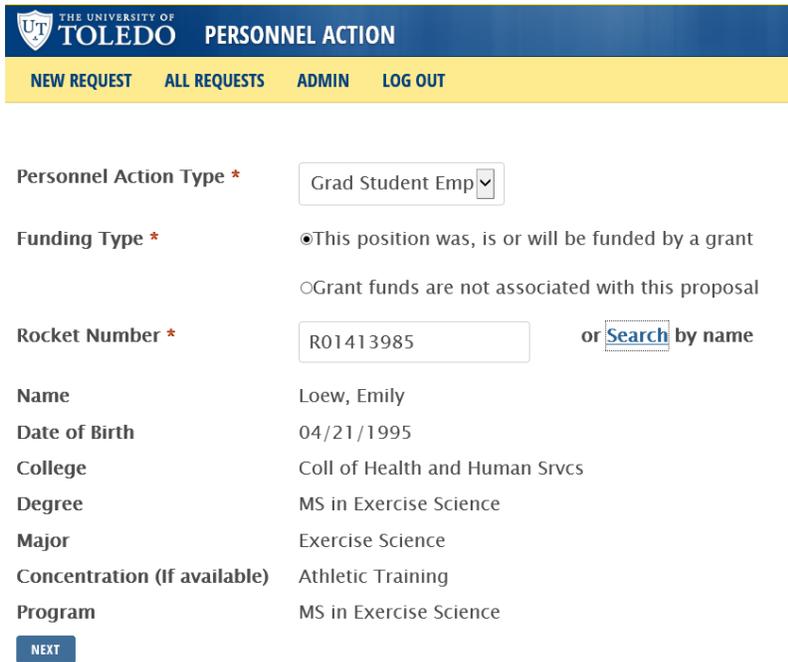


The screenshot shows the Banner Personnel Action Form interface. At the top, there is a navigation bar with 'PERSONNEL ACTION' and links for 'NEW REQUEST', 'ALL REQUESTS', 'ADMIN', and 'LOG OUT'. The main form area includes the following fields and options:

- Personnel Action Type ***: A dropdown menu with 'Grad Student Emp' selected. A blue arrow labeled '1' points to this dropdown.
- Funding Type ***: Two radio button options: 'This position was, is or will be funded by a grant' (selected) and 'Grant funds are not associated with this proposal'. A blue arrow labeled '2' points to the first option.
- Rocket Number ***: An empty text input field. A blue arrow labeled '3' points to this field.
- Search by name**: A link labeled 'Search by name' with a blue arrow labeled '4' pointing to it.

A 'NEXT' button is located below the Rocket Number field. An inset window titled 'https://bannerepafest.utoledo.edu/Home/SearchEmployee - Internet Explorer' is overlaid on the bottom right, showing a search form with 'First Name' (Emily) and 'Last Name' (Loew) entered, and a 'SEARCH' button.

5. Once Rocket ID is entered or search option completed, student information will populate



The screenshot shows the 'PERSONNEL ACTION' interface. At the top, there is a navigation bar with 'NEW REQUEST', 'ALL REQUESTS', 'ADMIN', and 'LOG OUT'. Below this, the 'Personnel Action Type' is set to 'Grad Student Emp'. The 'Funding Type' section has two radio buttons: 'This position was, is or will be funded by a grant' (selected) and 'Grant funds are not associated with this proposal'. The 'Rocket Number' is 'R01413985', with a 'Search by name' option. Below these are fields for 'Name', 'Date of Birth', 'College', 'Degree', 'Major', 'Concentration (If available)', and 'Program', all of which are populated with student information. A 'NEXT' button is located at the bottom left of the form area.

Note: If College, Degree, Major, or Program do not populate, student is not completely admitted into the College of Graduate Studies. There are several reasons why this may occur, so please contact graduateonlineapplication@utoledo.edu, 419-530-4723, or student can check their application status online. Until student is completely admitted, ePAF cannot be created.

6. Select Next button

Guide for Creating New Hire Banner ePAFs for Graduate Student Employees

Step Two: Enter Position Information – New Hire

1. Select action
2. Click radio button and enter PCN (Position Control Number i.e. P41146) using capital P; title of position will populate, or use the search button to find PCN associated with organization index
3. Enter Start and End Date or use calendar to select dates
4. Select Job location from drop-down

PERSONNEL ACTION

NEW REQUEST | ALL REQUESTS | ADMIN | LOG OUT

Rocket Number R01413985 Name Loew, Emily

Select Action:

New Hire GA: Grant-Funded 1

All Employee Positions

Select an existing position or type in a new position below 2

Type	POSN	Suffix	Title	Time Sheet	Organization	Start Date	End Date	Last Paid Date	FTE	Status
<input checked="" type="radio"/>	P41146		Intern Masters		Graduate Studies					

Or type in new position here

Position	Title	Time Sheet	Organization
<input type="text" value="P41146"/>	or Search by Organization/Index		

Start Date End Date 3

Job Location

May
2018

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

×

4

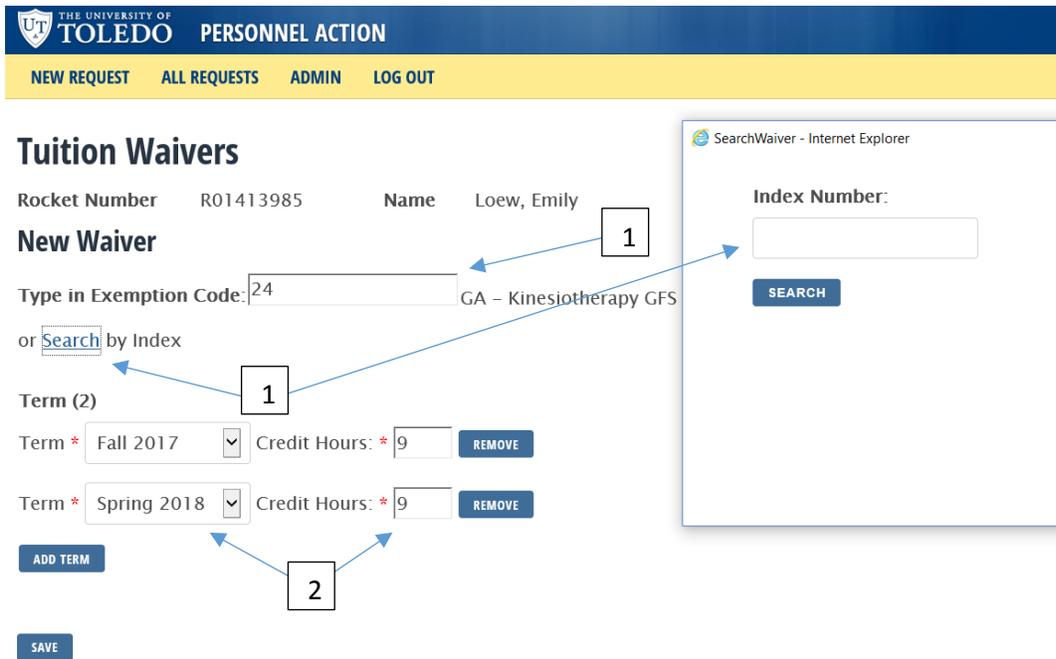
NEXT

5. Select the Next button

3 of 8

Step Three: Tuition Waiver

1. Enter Exemption Code tuition will be charged to, or search by Index number
 - a. Codes with letters of GFS in description stand for Grant-Funded Stipend - use when outside source is paying for student’s stipend
 - b. Codes with GA only are for TA’s and AA’s – use for general fund monies
 - c. Codes with Tuition Waiver must be submitted using Tuition Scholarship form, located on COGS website
2. Select Term (semester) and enter # of credit hours to waive
 - a. Limit of 3 active semesters can be selected at one time



The screenshot displays the 'Tuition Waivers' web application. At the top, there is a navigation bar with 'NEW REQUEST', 'ALL REQUESTS', 'ADMIN', and 'LOG OUT'. The main content area shows the 'New Waiver' form for user 'Loew, Emily' with Rocket Number 'R01413985'. The form includes a 'Type in Exemption Code' field with '24' and a description 'GA - Kinesiotherapy GFS'. Below this is a 'Search by Index' window with an 'Index Number' field and a 'SEARCH' button. The 'Term (2)' section has two entries: 'Fall 2017' and 'Spring 2018', each with 'Credit Hours' set to '9'. There are 'REMOVE' buttons for each term and an 'ADD TERM' button. A 'SAVE' button is at the bottom. Numbered callouts '1' and '2' are present: '1' points to the search window and the 'Search by Index' text, and '2' points to the 'ADD TERM' button.

3. Select Save button

Step Four: Review Document

1. Review all information; if any information is not correct, please select the Start Over button at the bottom of the page
2. If information is correct, select the Submit button

[NEW REQUEST](#) [ALL REQUESTS](#) [ADMIN](#) [LOG OUT](#)

Confirm Personnel Action

Employee Information

Rocket Number	R01413985
Name	Loew, Emily
Date of Birth	04/21/1995
College	Coll of Health and Human Svcs
Degree	MS in Exercise Science
Major	Exercise Science
Concentration (if available)	Athletic Training
Program	MS in Exercise Science

Personnel Action Information

Personnel Action Group	Grad Student Emp: Grant Funds
Action Type	New Hire GA: Grant-Funded
New Position Number	P41146
New Position Suffix	00
Position Start Date	08/01/2017
Position End Date	05/04/2018



Note: Once Submit button is selected, an ePAF will be created.

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Step Five: Enter Stipend Amount and FTE

Note: All information from previous screens has populated to the ePAF.

1. Annual Salary (Stipend) – Amount student is paid for time entered on Select Action screen (Step Two)
2. FTE – determined by # of hours student is working for PCN entered in Step Two of workflow
Typically:
 - a. .5 – Full Time GA working 20 hours per week
 - b. .375 – Three quarter GA working 15 hours per week
 - c. .25 – Part Time GA working 10 hours per week
 - d. .125 – One quarter GA working 5 hours per week

Note: ePAF will not be approved if student’s combined FTE is more than .625 FTE (25 hours per week).

Personal Information / Student / Faculty Services / Employee / Finance / Proxy			
Search <input type="text"/> <input type="button" value="Go"/>		RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT	
<h3>Electronic Personnel Action Form</h3>			
Enter the information for the ePAF and either Save or Submit			
Name and ID: Transaction: Transaction Status: Approval Category:	Emily Loew, R01413985 75881 Waiting New Hire GA: Grant-Funded, NHGRGR	Job and Suffix: Query Date: Last Paid Date:	See approval types below. Aug 01, 2017
<input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Delete"/>			
Approval Types Account Distribution Routing Queue Comments Transaction History New ePAF ePAF Originator Summary Return to ePAF Menu			

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* - indicates a required field.

New Hire GA, P41146-00 Intern Masters

Item	Current Value	New Value
Employee Status: (Not Enterable)		A
Employee Class Code: (Not Enterable)		G1
Home Organization: *		100610
Location Code: (Not Enterable)		MC AC
Home COAS: (Not Enterable)		T
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		07/29/2017
Personnel Date: MM/DD/YYYY(Not Enterable)		08/01/2017
Job Begin Date: MM/DD/YYYY(Not Enterable)		07/29/2017
Contract Type:		Primary
Annual Salary: *		[Redacted]
Pays: (Not Enterable)		20
Factor: (Not Enterable)		20
Timesheet Orgn: *		100610
FTE: *		[Redacted]
Step: (Not Enterable)		0
Job Status: (Not Enterable)		A
Job Change Reason: (Not Enterable)		09

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Step Six: Routing Queue

1. Designate appropriate approvers
 - a. PREAPP – will always be BANWORX
 - b. DEPT – should be Department Chair
 - c. DEANBM – should be Dean/Business Manager/Designee
 - d. PI – should be Principal Investigator for grant
 - e. GRANTS – should be Grant Analyst
 - f. COGS – should be ECOOPSH – Elaine Coopshaw
 - g. HRSTAF – should be PWILLARD – Paula Willard
 - h. HRAPPL – should be KGULDEN – Kelley Guldenpfennig

Please note the Originator, DEPT, DEANBM cannot be the same people. There must be a minimum of three different users for grant-funded GA assignments before it routes to College of Graduate Studies.

Labor Distribution Record, P41146-00 Intern Masters

Item		Current Value	New Value								
Jobs Effective Date: MM/DD/YYYY		<input type="text" value="08/01/2017"/>									
Personnel Date: MM/DD/YYYY		<input type="text" value="08/01/2017"/>									
Job Change Reason:		<input type="text" value="Not Selected"/>	<input type="button" value="v"/>								
Current											
Effective Date: 08/01/2017											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbr
New											
Effective Date: MM/DD/YYYY <input type="text" value="08/01/2017"/>											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Over
<input type="text" value="T"/>	<input type="text" value="205822"/>	<input type="text" value="205822"/>	<input type="text" value="100610"/>	<input type="text" value="61309"/>	<input type="text" value="4310"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="100.00"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total:										100.00	
<input type="button" value="Default from Index"/>		<input type="button" value="Save and Add New Rows"/>									

Ending Job, P41146-00 Intern Masters

Item	Current Value	New Value
Personnel Date: MM/DD/YYYY(Not Enterable)		<input type="text" value="05/04/2018"/>
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		<input type="text" value="05/04/2018"/>
Job End Date: MM/DD/YYYY(Not Enterable)		<input type="text" value="05/04/2018"/>
Job Status: (Not Enterable)		<input type="text" value="T"/>
Job Change Reason: (Not Enterable)		<input type="text" value="100"/>

Routing Queue

Approval Level	User Name	Required Action	Rem
5 - (PREAPP) Pre-Approval Review	<input type="text" value="BANWORX"/> . Banworx	<input type="text" value="Approve"/>	
10 - (DEPT) Dept Chair	<input type="text"/>	<input type="text" value="Approve"/>	
20 - (DEANBM) Business Mgr/Dean/Designee	<input type="text"/>	<input type="text" value="Approve"/>	
23 - (PI) Principal Investigator	<input type="text"/>	<input type="text" value="Approve"/>	
25 - (GRANTS) Grants Accounting	<input type="text"/>	<input type="text" value="Approve"/>	
30 - (COGS) College of Graduate Studies	<input type="text"/>	<input type="text" value="Approve"/>	
91 - (HRSTAF) HRIS	<input type="text"/>	<input type="text" value="Approve"/>	
99 - (HRAPPL) HR Apply/Superuser	<input type="text"/>	<input type="text" value="Apply"/>	

2. Comments box – shows detail information concerning tuition waiver

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3. Box below comments is where you can enter information concerning this ePAF
4. Save and Submit ePAF; you can Save and review and return to this ePAF to Submit at a later time if needed

Not Selected	▼	🔍			Not Selected	▼
Not Selected	▼	🔍			Not Selected	▼
Not Selected	▼	🔍			Not Selected	▼
Not Selected	▼	🔍			Not Selected	▼

Save and Add New Rows

Comment

Date: Aug 09, 2017 12:54:12 PM
Made by: . Banworx, BANWORX
Comments: NEW FEE WAIVER
 TERM: 201810 EXEMPTION CODE: 24 EXEMPTION DESC: DETAIL CODE: DETAIL DESC: CREDIT HOURS: 9
 TERM: 201740 EXEMPTION CODE: 24 EXEMPTION DESC: GA - Kinesiotherapy GFS DETAIL CODE: EHKF DETAIL DESC: GA - Kinesiology (GFS) A10772 CREDIT HOURS: 9

3



Transaction History

Action	Date	User Name
Created:	Aug 09, 2017	Mary M. Main

[Approval Types](#) | [Account Distribution](#) | [Routing Queue](#) | [Comments](#) | [Transaction History](#)

Save Submit Delete

[Return to Top](#)

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RELEASE: 8.10