



## Summer Research Hires for Sponsored Projects

### **Overview**

All summer research requests must be received by the Faculty Personnel Office (FPO) no later than 5:00pm on the 20<sup>th</sup> of each month to be included in the monthly payroll cycle.

Email notifications will be sent to individuals listed within the approval queue every Monday and Friday at 9:00am for outstanding summer research requests requiring his or her approval.

Access to initiate or approve EPAFs requires the user to have Banner access for the relevant organizational accounts. [Banner access requests](#) must be sent to [hris@gwu.edu](mailto:hris@gwu.edu).

If this is your first time submitting an EPAF, setup your Default Approval Queue before beginning (see APPENDIX).

Information you will need to initiate a research summer hires

- Employee's GWID
- Effective Date of the Hire (First day of the month is effective date of hire)
- Position Number (or the Banner Home Index so you can search for a position)
- Percentage of effort (% effort)
- Hour per pay\*
- Annual Salary (Appointment Salary)
- Number of Pays and Factors (number of months of the appointment)
- The End Date of the Appointment
- Financial Directors, SPA2 approvers and any other school required approvers (Dean Designee or Department Chair)
- Any attachments required for the hire

\*Hours Per Pay – multiply the effort rate by 174

100% effort = 174 hours per pay

75% effort = 130.5 hours per pay

50% effort = 87 hours per pay

25% effort = 43.5 hours per pay

20% effort = 34.8 hours per pay

10% effort = 17.4 hours per pay

## 1. EPAF MAIN MENU – NEW EPAF

The electronic personnel action form (EPAF) is located in [GWeb](#) under Employee Information > EPAF Main Menu. To initiate a new request, select the “New EPAF” link from the menu options.

### Electronic Personnel Action Form

[EPAF Approver Summary](#)

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[EPAF Proxy Records](#)

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Enter the faculty member’s GWID in the ID box. The faculty member’s information will auto populate in the adjacent text box. If the GWID is unknown, click on the magnifying glass icon to search for the faculty member.

### New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID: \*   

Query Date: MM/DD/YYYY\*

Approval Category: \*

 There are no active jobs based on the Query Date.

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)  
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#### KEY NOTES:

The current date will default as the query date. The query date **must always be the first of the month**, otherwise you will receive an error and will be unable to submit the request.

The approval category must be Summer Research, SMRCH

## 2. NEW EPAF JOB SELECTION

*Enter Position Number and Suffix, select Go.*

#### Summer Research New Job, SMRCHJ

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									<input checked="" type="radio"/>
	Primary	101607	00	Uv Faculty Regular	153801, ADMINISTRATION-SOCIOLOGY	07/01/93		05/31/20	Active	<input type="radio"/>

#### KEY NOTES:

Summer Research positions are school specific, meaning that each school has their own set of position numbers that they use to submit summer research requests.

Summer Research faculty are paid concurrently on the same position number, but for another job, you must change the suffix from 00 to 01 (if the faculty member holds multiple jobs concurrently on the same position number continue to increase the suffix by 1

Select the appropriate Employee Class, COA, and Budget Organization and click go to produce a list of desired positions. Click on the position that you need and add the unique suffix and Go.

### 3. Electronic Personnel Action Form – Summer Research

*Enter Job Begin Date (only for new position): Typically the first day of the month in which the position begins.*

*Enter Job Effective Date: Must always be the first day of the month in which the position begins.*

*Enter Personnel Date: The actual start date of the position.*

*Enter FTE (level of percent effort)*

*Enter Hours per Pay (multiply the effort rate by 174)*

*Enter Annual Salary: Total amount to be paid over the duration of the position.*

*Enter Pays and Factor: The number of months over which the position should be paid.*

*Job Change Reason (SECA, Secondary Job Added)*

\* - indicates a required field.

#### Summer Research New Job, A09235-00 Lead Research Scientist PT

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		<input type="text"/>
Jobs Effective Date: MM/DD/YYYY*		<input type="text"/>
Personnel Date: MM/DD/YYYY*		<input type="text"/>
Job Status: *(Not Enterable)		<input type="text" value="A"/>
Contract Type: *(Not Enterable)		<input type="text" value="S"/>
FTE: *		<input type="text"/>
Hours per Pay: *		<input type="text"/>
Annual Salary: *		<input type="text"/>
Pays: *		<input type="text" value="3"/>
Factor: *		<input type="text" value="3"/>
Step: *(Not Enterable)		<input type="text" value="0"/>
Job Change Reason: *(Not Enterable)		<input type="text" value="SECA"/>

#### KEY NOTES:

The Job Begin Date and Jobs Effective must be the same for new positions (the 1<sup>st</sup> of the month). If the faculty member has been paid from the same position before, the Job Begin Date will default with the original hire date for first job once the form has been saved (this cannot be changed). The job effective date represents when the new assignment and pay will begin and must always be the 1<sup>st</sup> of the month.

The Personnel Date is a free form date field that does not have any effect on the job payment.

Annual Salary is the total amount to be paid over the duration of the position.

Pays and Factor value must always match (e.g. position lasting from June 1 to August 31 would be 3/3).

The system will divide the Annual Salary by the Pays and Factor value to determine the pay amount for each month (e.g. lump sum payments would have a Pays and Factor of 1).

### 4. Job Termination

*Enter Jobs Effective Date: This must always be the last day of the month in which the position ends.*

*Enter Personnel Date: The actual end date of the position.*

#### Summer Research Termination, A09235-00 Lead Research Scientist PT

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

## 5. Review Position Index Distributions

*Review Labor Distribution for accuracy.*

New Job Labor Distribution for Employee, [REDACTED] Lead Research Scientist PT

Current

Effective Date: 06/01/2020

COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date PTA Information

New

Effective Date: MM/DD/YYYY 06/01/2020

COA	Index	Fund	Organization Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	PTA Information
Z	PI 152901	110100	152901	51111	INS	152901			100.00		
	PI										
	PI										
	PI										
	PI										
									<b>Total:</b>	100.00	



Default from Index Save and Add New Rows

### KEY NOTES:

It is important to review the Labor Distribution information to ensure the correct position number was chosen. This information cannot be changed by the user on the form as it is tied to the position number. Account Number: 51111 = Regular Full-time Appointment

When adding an index to the distribution select COA of Z and then enter or search for the index. Click on the "Default from Index" button and the fund, organization, program and pta information will default in. You will need to enter the Account and the Percent. The total percent must equal 100.

Contact the Faculty Personnel Office if you believe the information tied to the position number is incorrect.

## 6. Enter Routing Queue of Approvers

*Enter appropriate approver "User Names" for each level.*

Routing Queue

Approval Level	User Name	Required Action
20 - (SPA2U) University SPA2		Approve
30 - (EFD) Entity Financial Director		Approve
90 - (FAPERR) Faculty Affairs--Research		Approve
99 - (OVPRCP) OVPR Client Partner		Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Save and Add New Rows

### KEY NOTES:

If you do not know the "User Name" for a specific approver, click on the magnifying glass to search all valid values for that approver level.

## 7. Required Comments

*Describe the purpose of the summer research request and click save.*

Comment

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

### KEY NOTES:


Comments regarding the summer research request are essential in determining the activity and payment. These comments allow Faculty Personnel to ensure the form has been filled out correctly for the stated purpose.


Requests without comments will be returned for correction.

## 8. Save and Submit Transaction

*Click Save once the form has been filled out to see if any errors were made.*

*Click Submit to submit EPAF for approval.*

 Your change was saved successfully.

 Enter the information for the EPAF and either Save or Submit

**Name and ID:** [REDACTED]

**Transaction:** 93565

**Query Date:** 06/01/20

**Transaction Status:** Waiting

**Approval Category:** Summer Research, SMRCH

[Document Attachments](#)

### KEY NOTES:

Once the form is "Saved" it will display any errors associated with the request. Correct any errors and save again before submitting.

Once the form is submitted it will be in the approval queue for the first person entered into the routing queue. Please contact that person directly if you notice anything that needs to be changed.

## APPENDIX

### Setting Up Default Routing Queue

From the EPAF Main Menu, select EPAF Originator Summary.

Select Default Routing Queue.

At the EPAF Default Routing Queue, please select the appropriate Approval Category and click GO.

Under Approval Queue, select the appropriate Approval Levels and Required Actions Click

Save and Add New Rows when complete.

### Electronic Personnel Action Form

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### EPAF Originator Summary

**Current** History

Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

Transaction Status:

**No transactions found in your queue.**

[New EPAF](#) | [Default Routing Queue](#) | [Search](#) | [Superuser or Filter Transactions](#)

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### EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category:

#### Approval Queue

Approval Level	User Name	Required Action
<input type="text" value="Not Selected"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="Not Selected"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="Not Selected"/>	<input type="text"/>	<input type="text" value="Not Selected"/>
<input type="text" value="Not Selected"/>	<input type="text"/>	<input type="text" value="Not Selected"/>

[EPAF Originator Summary](#)

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#### KEY NOTES:

Approval Category should be **Summer Research, SMRCH**.

All approval queues must have **20 – (SPA2U) University SPA2** in their Approval Queue. The Required Action for this level should be **Approve** (see last column on form).

All approval queues must have **30 – (EFD) Entity Financial Director** in their Approval Queue. The Required Action for this level should be **Approve** (see last column on form).

All approval queues must have **90 – (Faculty Affairs) Faculty Affairs--Research** as the final Approval Level. The Required Action for this level should be **Approve** (see last column on form).

All approval queues must have **99 – (OVPRCP) OVPR Client Partner** in their Approval Queue. The Required Action for this level should be **Apply** (see last column on form).

## Modifying the Labor Distribution

Initially the labor distribution will default from the position labor shown. If the employee has previously been assigned this position, the labor distribution would be displayed under “Current” and repeated under “New”.

New Job Labor Distribution for Employee, ██████████ Lead Research Scientist PT

**Current**

Effective Date: 06/01/2020

**COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date PTA Information**

**New**

Effective Date: MM/DD/YYYY 06/01/2020

COA	Index	Fund	Organization Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date	PTA Information
Z	PI	152901	110100	152901	51111	INS	152901		100.00				
	PI												
	PI												
	PI												
	PI												
									<b>Total:</b>	100.00			

Default from Index Save and Add New Rows

To change the labor distribution, type in Z as the COA and enter the new Index number. Click on the “Default from Index” button. **Note:** You will receive errors. Ignore and continue.

The Fund, Organization, Program and PTA Information will default in.

Add the Account to all rows and change the percent to the appropriate number. If you want to remove a row, change the percent to zero. Click the “Save and Add New Rows” button. **Note:** You will receive a message that your changes were saved successfully. You now need to remove the zero percent rows.



Scroll back down to the labor distribution. You will now see “Remove” checkboxes. Click on the checkbox next to the zero percent row and click Save. The zero row has now been removed.

Labor distributions can also be altered after the job is created by navigating to the New EPAF Person Selection screen and selecting Job Labor Distribution Change, LBRDIS instead of Summer Research, SMRCH.

## New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.


\* - indicates a required field.

ID: \*    

Query Date: MM/DD/YYYY\* 06/01/2020

Approval Category: \* Job Labor Distribution Change, LBRDIS

Go

 There are no active jobs based on the Query Date.

All Jobs

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)  
[Return to EPAF Menu](#)

## Uploading Supporting Documentation

After the Summer Research request has been filled out and saved, users will be able to upload supporting documentation to the request.

**Name and ID:** [REDACTED]  
**Transaction:** 94611 **Query Date:** 06/01/20  
**Transaction Status:** Waiting  
**Approval Category:** Summer Research, SMRCH

[Document Attachments](#)

Click on the "Document Attachments" link to navigate to the EPAF Document Attachment page.

## EPAF Document Attachments

EPAF Document Attachments

No documents are available for this transaction.

**Document Attachments**

<input type="button" value="Choose File"/>	No file chosen	<input type="button" value="FileUpload"/>	<a href="#">Refresh</a>
<input type="button" value="Choose File"/>	No file chosen		
<input type="button" value="Choose File"/>	No file chosen		

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Select "Choose File" to navigate your computer for the supporting documentation.

Once all supporting documents have been selected click "File Upload" to complete.

After all files have been uploaded you can navigate back to the Summer Research request and submit for processing.