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Authorization and Use

Proper Use and Information Privacy Considerations
Access to Banner systems is restricted to those who require access in order to fulfill their job responsibilities. The data steward for each operational area makes the final determination about what access is granted.

Employees who are granted access to the Banner systems are responsible for protecting their access privileges. All employees should be familiar with the following policies: Acceptable Use Of Information Systems, and Policy 7000: Acceptable Use and Administration of Computer and Communications Systems. Violators may be subject to disciplinary and legal action.

Banner sign-on enables tailored access based on the user’s job function. Therefore, logged on sessions should never be left unattended.

Certain information in the Banner systems is sensitive and should be considered private. Information obtained from the Banner systems should never be shared outside the workplace or used for any purpose that is not related to assigned job responsibilities. Please refer to the guidelines for Policy 4082: Appropriate Use of Electronic Personnel and Payroll Records.

Initial Authorization
The online Banner Access Request System may be found by going to http://www.computing.vt.edu/content/banner-access. Click on “For Finance, HR, Student Accounts Receivable, or Financial Aid use the Online Banner Access Form. You will login with your PID and password then proceed to fill out the request.

Please note: At the end of completing your access request online you will need to print the last page and have it signed by a Dean, Director or Department Head. This paper copy must be submitted to the Department of Human Resources (Mail Code 0318).

Updates to Existing Authorization
If a person who already has banner access needs access to additional departments, the dean, director or department head should send an e-mail request to hrbanneraccess-g@vt.edu requesting access to the additional departments. The note should specify the user’s PID and the departments to be added.
Password Information and Chart

When you are granted access to HR Banner, you receive an email from imsbann@vt.edu with a link to create your Banner password.

Users will need to change their Banner password every year. Passwords must meet the following requirements:

- Password must have a minimum of 8 characters.
- Cannot be one of your last 5 passwords.
- It must contain these types of characters:
  - Numeric: 0-9
  - Uppercase letters: A-Z
  - Lowercase letters: a-z
  - Special Characters: ! . , ( ) % & ? (Do not use ‘ / @ $ = or “)
- Must have at least 1 uppercase, 1 lowercase, 1 numeric and 1 special character.
- It must not contain your username forward or backward.
- It must not contain a keyboard sequence of more than 5 or more characters
  - From a standard keyboard (ex. asdfg or gfdsa)
  - Repeated characters (ex. aaaaa or 55555)
  - Incrementing or decrementing (ex. abcde or 76543)

Password Hints:

- Passwords are only as secure as they are unpredictable.
- Passwords should be easy to remember, easy to type, but hard to guess.
- Passwords should not be self-descriptive (e.g. names, dates, etc.)
- Try using numbers or punctuation (e.g. I8toomuch! or NY2big4me)
- Try using the first letter of each word in a phrase (e.g. “We sure do love to do payroll” becomes Wsdl2dp)
- Never write passwords down or share them with another user.
- Change your password periodically, especially when there is reason to suspect that someone other than you has learned your password.
- If you forget your password, please contact 4-help (231-4357) to request a password reset.
<table>
<thead>
<tr>
<th>Banner Password</th>
<th>PID Password</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Uses:</strong></td>
<td><strong>Uses:</strong></td>
</tr>
<tr>
<td>• Creating PAFs in Banner</td>
<td>• Log into Banner</td>
</tr>
<tr>
<td>• Banner Web Reports</td>
<td>• HR Resource Guide</td>
</tr>
<tr>
<td><a href="https://webapps.es.vt.edu/webreport/submit">https://webapps.es.vt.edu/webreport/submit</a></td>
<td><a href="https://hrapps.hr.vt.edu/resourceguide/">https://hrapps.hr.vt.edu/resourceguide/</a></td>
</tr>
<tr>
<td></td>
<td>• MyVT</td>
</tr>
<tr>
<td></td>
<td><a href="http://www.my.vt.edu">http://www.my.vt.edu</a></td>
</tr>
<tr>
<td></td>
<td>• Leave Reports</td>
</tr>
<tr>
<td></td>
<td><a href="http://www.hr.vt.edu/leaveentry">http://www.hr.vt.edu/leaveentry</a></td>
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### Contact Information

<table>
<thead>
<tr>
<th>Service</th>
<th>Phone Number</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banner Alumni Support</td>
<td>(540) 231-2877</td>
<td><a href="mailto:terryj@vt.edu">terryj@vt.edu</a></td>
</tr>
<tr>
<td>Banner Finance Support</td>
<td>(540) 231-8624</td>
<td><a href="mailto:kings@vt.edu">kings@vt.edu</a></td>
</tr>
<tr>
<td>HR Banner Support</td>
<td>(540) 231-9331</td>
<td><a href="mailto:hrservicecenter@vt.edu">hrservicecenter@vt.edu</a></td>
</tr>
<tr>
<td>Banner Student Support</td>
<td>(540) 231-7951</td>
<td><a href="mailto:dagreen@vt.edu">dagreen@vt.edu</a></td>
</tr>
<tr>
<td>Financial Aid Questions</td>
<td>(540) 231-5179</td>
<td><a href="mailto:finaid@vt.edu">finaid@vt.edu</a></td>
</tr>
<tr>
<td>Forgotten Passwords</td>
<td>(540) 231-4357</td>
<td><a href="http://4help.vt.edu">http://4help.vt.edu</a></td>
</tr>
<tr>
<td>Leave Reporting</td>
<td>(540) 231-9331</td>
<td><a href="mailto:leave@vt.edu">leave@vt.edu</a></td>
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### Related Links

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<tr>
<td>Banner</td>
<td><a href="http://www.banner.vt.edu">http://www.banner.vt.edu</a></td>
</tr>
<tr>
<td>HR Employee Resource Guide</td>
<td><a href="https://hrapps.hr.vt.edu/resourceguide/">https://hrapps.hr.vt.edu/resourceguide/</a></td>
</tr>
<tr>
<td>Leave Reporting and Information</td>
<td><a href="http://www.hr.vt.edu/leave/index.html">http://www.hr.vt.edu/leave/index.html</a></td>
</tr>
<tr>
<td>Web Reports</td>
<td><a href="https://webapps.es.vt.edu/webreport/submit">https://webapps.es.vt.edu/webreport/submit</a></td>
</tr>
</tbody>
</table>
Process Overview

Department enterers are responsible for entering and maintaining personnel records.

The first step in the enterer’s process is to create or update the person’s biographical record. This record contains general identification and biographic information about an individual. Enterers should be careful to search for a person prior to creating the record in order to avoid creating a duplicate. If a search results in finding that the person record already exists, enterers should take care to ensure that the information is still accurate. A person record must exist in Banner before a person can be given an appointment.

The second step in the enterer’s process is to set up the appointment*. P14, graduate, non-student wage, emergency hire, and undergraduate appointments are all set up by the department enterer. Only staff and faculty appointments are set up by the Department of Human Resources. Essentially, this step joins the person record with a position record. When these two records are joined, the person becomes an employee, and the relationship between the person and the position becomes a job. An active job record is what causes a timecard to be generated for the employee.

Note: The first job to which an employee is appointed is the primary job. The primary job is the one that determines benefits and tax withholdings. If an employee is appointed to a second job, that one becomes a secondary job and does not affect benefits and tax withholdings. Enterers must contact the Department of Human Resources if the second appointment should be the primary job.

The third step pertains to timecards. If a department uses TimeClock Plus the wage hours worked will automatically be uploaded to Banner and some manual entry or corrections may be required. Otherwise the enterer will be responsible for wage timecard entry. For salaried timecards overtime entry or an adjustment payment for a P14/GA may be needed. This step differs from the first two in that it needs to be completed for each pay period so that the employees will be paid.

Note: The workweek for calculating overtime is Saturday 12:01 a.m. to Friday midnight. Non-exempt employees are eligible for overtime at the rate of time and one half. Exempt employees are ineligible for time and a half overtime, but, with approval in advance from the Department of Human Resources, an exempt employee may sometimes be eligible for straight time overtime. Hours not actually worked, such as holiday or sick hours, do not count toward calculating overtime. Supervisors must approve all overtime before it is worked.

Periodically throughout the employee's appointment, department enterers may also be called upon to do status or funding changes. Additionally, the enterer will need to terminate the appointment when the employee's job terminates.

* Some foreign nationals cannot be hired at Virginia Tech. Please contact the Controller's office to attend a training class on “Employing Foreign Nationals”.


Position Types

Salary Payroll (SA)
- Staff (HR Entry)
- Faculty (HR Entry)
- P14
- Graduate Assistantships

Wage Payroll (WA)
- Non-Student Wage
- Emergency Hire (Limited to 130 calendar days)
- Student Wage
- Federal Work Study (75% of funding comes from Financial Aid)
- Sporadic Hire (10 hours or less per week)

Stipend (ST)
- Graduate Fellowships
- Undergraduate Fellowships
- Summer Session
- VT Faculty Teaching
- Non-VT Faculty Teaching

Refer to page 27 for Affordable Care Act (ACA) information & Wage Limits
<table>
<thead>
<tr>
<th>Semester</th>
<th>Fiscal Year</th>
<th>Pay Period</th>
<th>Pay Number</th>
<th>Last Day To Enter Appts., Status Changes, Separations</th>
<th>Salary Overtime &amp; Retro Entry (PHAHOUR)</th>
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<td>Tuesday, January 3, 2017</td>
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<tr>
<td></td>
<td></td>
<td>January 10 – January 24</td>
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<td>January 25 – February 9</td>
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<td>March 25 – April 9</td>
<td>7</td>
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<td>Friday, April 14, 2017</td>
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<td>April 25 – May 9</td>
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<td>Monday, May 22, 2017</td>
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<td>Wednesday, June 7, 2017</td>
<td>Friday, June 16, 2017</td>
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<td>June 25 – July 9</td>
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<td>Wednesday, July 5, 2017</td>
<td>Thursday, July 6, 2017</td>
<td>Friday, July 14, 2017</td>
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<td>Friday, July 21, 2017</td>
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<td>August 25 – September 9</td>
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<td>Tuesday, September 19, 2017</td>
<td>Wednesday, September 20, 2017</td>
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<td>September 25 – October 9</td>
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<td>Monday, October 23, 2017</td>
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<td>Tuesday, December 5, 2017</td>
<td>Wednesday, December 6, 2017</td>
<td>Friday, December 15, 2017</td>
</tr>
</tbody>
</table>

**Salary Payroll Schedule - 2017**

- **Fall Semester** Classes Begin 8/28/17 Exams End 12/20/17
- **Spring Semester** Classes Begin 1/17/17 Exams End 5/10/17
- **Summer I** Classes Begin 5/22/17 (Paid 7/3/17)
- **Summer II** Classes Begin 7/5/17 (Paid 8/16/17)
<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Pay Period</th>
<th>Pay Number</th>
<th>Final Cutoff for Entering Appts., Status Changes, Separations *</th>
<th>Timeclock Export**</th>
<th>Payday</th>
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<tbody>
<tr>
<td>December 16 - 31</td>
<td>1</td>
<td>Thursday, December 22, 2016</td>
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<tr>
<td>January 16 - 31</td>
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<td><strong>Friday, Dec 1 &amp; Monday, Dec 4</strong></td>
<td>Friday, December 15, 2017</td>
<td></td>
</tr>
<tr>
<td>December 1 - 15</td>
<td>24</td>
<td>Friday, December 15, 2017</td>
<td><strong>Monday, Dec 18 ONE DAY ONLY</strong></td>
<td>Friday, December 29, 2017</td>
<td></td>
</tr>
</tbody>
</table>

*Wage appointments should be entered prior to the employee beginning work so they are able to clock in and out

**TimeClock exports are run at 2 pm on the first day and 11am on the second day when there are 2 days of entry. When TimeClock exports are one day only, the export is run at Noon.

Please enter any additional hours after the TimeClock export for your department has been verified.
1. Double click on the Banner icon or select Banner from your browser's bookmarks. If you do not have the icon on your computer you can go to http://www.banner.vt.edu to get the correct URL.

2. Enter your VT PID and PID password then click the Login button. **Please Note**: This is not your Banner password but however you will need your Banner password to create PAFs. If you have configured the 2-Factor authentication you will need to log in using your 2-Factor method.

3. The Banner session will now appear in your browser window.

4. Double click on Manage the Enterprise. Then, double click on VT HR (Departmental Use) Menu. HR Banner forms will appear underneath this menu.

4. Access the forms by either double clicking on the form description or name. You can also access a form by typing the form name into the Go To field.
Searching

Please Note: Always perform a search using the search functionality in the PWAEBIO form to verify that a person does not already exist in Banner before entering their biographic and demographic information.

1. Navigate to the PWAEBIO form. In the ID field type the person's social security number. If a name appears to the right of the ID then Banner has found a match. If not then you will need follow the next steps to perform a name search.

2. Click on the down arrow button at the top of PWAEBIO to the right of the ID field to get to the search screen.

3. Type as much of the Last Name and First Name as is known into the name fields. You can use % as a wildcard designator.

   Ex. Smith Jo%
   Adam% Marg%

   The first example will find both John and Jonathon. The second will find both Adams and Adam, and both Marge and Margaret.

4. To execute the query, either press F8 on the keyboard, or click on the Execute Query icon at the top of the menu bar.

5. If any records exist that meet your search criteria, they will appear on the screen. If the name of the person you are searching for appears double click on the record to populate the information in the PWAEBIO form. Update the information as necessary.

   If the name appears more than once, please check the person's birthday to find a match or see if the person had a name change. There will be a N in the Change column to identify a name change. Please watch out for duplicate records (more than one record created for a person). If a duplicate record has been found, please contact the HR Service Center to remove one of the records.

   If no records exist that meet your search criteria, “Query caused no records to be retrieved” will appear at the bottom of the screen. Continue searching by following the next few steps.

   FRM-40031: Query caused no records to be retrieved. Re-enter.
6. To cancel the ID query click on the Cancel Query icon at the top of the menu bar.

7. To enter a new query, click on the Enter Query icon.

8. If no records exist that meet your search criteria you can now go to the PWAEBIO form to add the person record. The person record must exist in the Banner system before an appointment can be set up.

**Alternate Search**

An alternate search method is available but not recommended unless you are positive that the person you are searching for already exists in Banner.

1. Position your cursor in the ID field on PWAEBIO. If needed highlight the ID shown on the screen and press the delete key to clear the key block area.

2. Press the tab key to position the cursor in the next field. Type in your search criteria using mixed case, for example Griffs%, then press the enter key.

3. The results of your search will appear in the Search Results window.

If too many results are returned narrow your search using the additional fields at the bottom of the pop-up window then click the magnifying glass button to re-query.
**Biographical Information**

Use the PWAEBIO form to add or update existing person records. You can update information for current employees where the primary job is located in your department. Your department number will display in the Home Orgn field on PWIEMPV if this is the case. Contact the HR Service Center at (540) 231-9331 if a change needs to be made or you do not have access to the form.

**Forms Needed** (Maintain this form in your departmental files in accordance with the retention schedule established by Records Management):

- [Wage Employee Appointment Record (P12W)](P12W) for Non-Student Wage, Student Wage, Emergency Hire, P14s and Summer Sessions.
- Employment Information (section in the offer letter) for Staff and Faculty

1. Navigate to the PWAEBIO form and perform a search to see if the person already exist (refer to page 12).

   ![Image](image.png)

   If the person record already exists the name will display in the key block area. If the person record does not already exist the name will not display in the next block area.

   All students (graduate and undergraduate) already have an existing VT ID number to be enrolled in classes. Please perform a search before creating a new record in Banner. You may need to update the record if the required fields are not populated.

2. If the person record does not exist one will need to be created. To create a new person record, place cursor in ID field in the key block area and click the Generate ID button. The word “GENERATED” will appear in the ID field.

   Next, click down in the ID field in the Identification and Biographical Information block. The ID and SSN fields will populate with the word “GENERATED”.

   **Note:** After entering all the fields on PWAEBIO an ID number will automatically be assigned and will appear in both ID fields when the record is saved.

3. **SSN:** Type over the word “GENERATED” in the SSN field with the person’s social security number. If there is not a SSN available the generated ID will populate in this field. A SSN must be entered for payroll purposes.

4. **Last Name:** Type the person’s legal last name as printed on the social security card or any other type of legal document (capitalize the first letter). Only use punctuation and spaces when the legal name includes them (e.g., Cooper-Smith, De La Rosa).
5. **First Name**: Type the person's legal first name as printed on the social security card or any other type of legal document (capitalize the first letter).

6. **Middle Name**: Type the person's legal middle name as printed on the social security card or any other type of legal document (capitalize the first letter).

7. **Suffix**: Type the name suffix with punctuation as appropriate i.e., Jr., Sr., II. *Do not use Dr. or Ph.D. please contact the HR Service Center to have this added.*

8. **Pref. First Name**: Type the person's preferred first name, as requested. This name will display in the directory otherwise the first name will be displayed.

9. **Hokie SPA Faculty Access**: Use this field to set up faculty access in Hokie SPA for faculty and P14s (adjunct faculty members) who are teaching a class.

10. **Email Address**: Type the person's email address. They will receive an email from Human Resources. If an email address is not provided then enter hrservicecenter@vt.edu and a letter will be mailed to them.

11. **Date of Birth**: Type the person's date of birth (dates can be entered as mmddyy or dd-mon-yyyy e.g., 011259 or 12-JAN-1959.) The first method of entry will format correctly when you click in the next field.

12. **Gender**: M (Male) displays as the default. Type F (Female) to change gender.

13. **Citizenship**: Select appropriate citizenship code from the list of values. Click on the down arrow button to view the list of values. If Foreign National, contact Payroll.

14. **New Ethnicity**: Select appropriate ethnicity code from the list of values.

15. **Race**: Select appropriate race code from the list of values. Click on the down arrow button to view the list of values. You may select more than one value.

16. **Mail Code**: Type the four-digit VT mail code where on-campus mailings should be sent. If the employee is located off campus and wants to receive their mail at their mailing address please enter 9999.

17. **Location**: Type or select from the list of values the three-digit location code, which corresponds to the county where the employee works (121 defaults for Montgomery County).

18. **Address Type**: Type or select from the list of values the address type code. MA (Mailing Address) is required for employees and should always be the first address type entered. OF (Office Address) should be entered second and will display in the directory. After entering all information for the mailing address and saving it, place the cursor in the address line and press the down arrow key on the keyboard to open a new address block and enter the OF information.

19. **Address**: Type the street address for MA address. Use standard abbreviations and do not use the comma, period, pound sign or apostrophes. Please use “APT” abbreviation to reflect apartment information.

   Hokie Bird  
   123 Drillfield Dr  
   Apt 1872
Confidential: Select the confidential check box when employees want their home address kept confidential. If this box is selected, the employee's mailing address will not display in the directory.

Zip/PC: Type the zip code then click in the city field. City, state, and county fields will display defaults based on the zip code entry. Note: If you clicked in the city field before the zip code field, city, state, and county fields must be typed.

20. City: Type the city if zip code was not entered first.

21. State/Province: Type the state if zip code was not entered first.

22. County: Type or select from the list of values if zip code was not entered first.

23. From: The current date will default in.

24. To: If the address is only valid for a specified period of time type the last date the address will be effective. If no last date is specified, leave this field blank. These dates are used to keep history when an employee has a mailing address change.

25. Phone: Type the 3-digit area code in the first block, 7-digit number with no hyphen in the second block, and extension number (if applicable) in the third block. You may also enter an international phone number if needed.

Unlisted: Select the confidential check box when employees want their home phone number kept confidential. If this box is selected the employee's phone number will not display in the directory.

26. Type: Type or select from the list of values the phone type (MA for home, OF for office).

27. Nation: Leave this field blank if the employee is from the USA. Select from the list of values if the employee is not from the USA.

28. Save after entering all information for the mailing address.

29. If needed, position the cursor in the address line and press the down arrow key on the keyboard to enter the office address (address type - OF).

When typing the office address please follow this format if the address is on the Blacksburg campus:

Department Name (MCxxxx)
Building Name, RM or STE XXX, Virginia Tech
XXX Street Name
Blacksburg, VA 24061

30. Save after entering all information for the office address.
**Additional Phone Numbers**

Use the PPATELE form to add additional phone numbers. **Please Note:** Additional phone numbers will not appear in PeopleSearch (VT online directory)

1. Navigate to PW AEBIO and click on the down arrow button beside the phone field.

2. Click in the Phone Type field to populate the data. Phone numbers that were previously entered on PW AEBIO will display.

3. To enter an additional phone number record position the cursor in the Phone Type field in an empty row. You may have to press the arrow down key on the keyboard until a blank row appears.

4. **Phone Type:** Select the appropriate phone type from the list of values by clicking on the down arrow button.

5. **Area Code:** Type the 3-digit area code.

6. **Phone Number:** Type the 7-digit phone number with no hyphen or space.

7. **Phone Ext:** Type the extension if one exists.

8. **Type:** Select the appropriate type code.

9. **Seq:** The sequence number indicates the relationship between the phone and the address. Type the sequence number that the phone number corresponds with the address in PW AEBIO. You can press the down arrow button to locate the corresponding address.

10. Save after entering all information for a phone number.
**Emergency Contacts**
All employees need to have at least one emergency contact in Banner.

1. Navigate to the PW AEBIO form and click on the Emergency Contact tab or select from the Options menu at the top of the menu bar.

2. **Priority:** Type 1 for the 1st priority, 2 for the 2nd, etc.

3. **Contact Last Name:** Type the last name of the contact (capitalize the first letter).

4. **First:** Type the first name of the contact (capitalize the first letter).

5. **Mid:** Type the middle initial, if known (capitalize).

6. **Relationship:** Select from the list of values by clicking on the drop down arrow button.

7. **Address Type:** Type MA for mailing.

8. **Address:** If needed, type the street address. If you selected MA above the mailing address of the employee will default in. If this is not correct simply type over the information.

9. **ZIP/PC:** Type the zip code and proceed to city. City, state and county will default.

10. **Nation:** If not the USA, select from the list of values.

11. **Phone:** Type the 3-digit area code, 7-digit phone number and extension as needed. If an additional phone number needs to be entered use a blank line in the address field.

12. Save the contact record. To enter an additional contact position the cursor in the Contact Last Name field and press the arrow down key on the keyboard.
Email Address
Information must be entered in PWAEBIO before a PID can be generated. The official Virginia Tech PID email address will be automatically populated into the GOAEMAL form shortly after the PID is assigned. Alias and home email addresses can be also be added if desired. However only the official primary VT email address will display in the directory.

1. Navigate to the PWAEBIO form and click on the Email tab or select from the Options menu at the top of the menu bar.

2. **E-mail Type**: Select the appropriate code from the list of values.

3. **E-mail Addr**: Type the complete email address using the format userid@node.

4. **Comment**: Type a comment, if desired.

5. Save the email address record.

Information about PIDs can be found at [http://www.computing.vt.edu](http://www.computing.vt.edu)
Name Changes
Virginia Tech is required to maintain an employee’s legal name (the name listed on the social security card) and legal social security number in Banner. Salaried staff and faculty employees will need to visit the Department of Human Resources and bring their new Social Security card.

For wage and P14 employees the name change will be made at the department level. Before changing an employee's name in Banner please obtain a signed hard-copy of the Change of Name and Address (P12B) form and also the employee's new Social Security Card. The P12B form must be kept at the department to satisfy legal requirements.

- For wage employees a copy of the new SSN card will need to be sent to Payroll (Mail Code 0339).
- Departments are not required to keep a copy of the social security card in the department files, just write a note on the P12B form that you have seen the new social security card.

1. To change the name navigate to the PWAEBIO form.

   ![PWAEBIO Form](image)

   **Last Name:** Highlight the current last name and type over it with the new last name. Repeat for First Name and Middle Name as appropriate.

2. Save the name change(s). Banner will keep a record of the person’s previous name.
Address Changes
Employees can change their addresses one of two ways. They can change it themselves by logging into MyVT [http://my.vt.edu](http://my.vt.edu) using their PID or they can complete a Change of Name and Address (P12B) form to change a mailing address. If an employee submits a P12B follow the steps below to change the address. If you change an employee's mailing address you must keep a copy of the P12B in a departmental file to satisfy legal requirements.

1. Navigate to the PWAEBIO form.

![Address Information Form](image)

Note: Mailing Addresses should not be typed over. To change them use the From and To fields. There cannot be an overlap in the dates and there should not be a gap between the dates.

2. End the old address by entering the last date the employee was at that address in the To field of the old address record then click on Save.

3. Begin the new address by entering the very next day in the From field on the new address record. To create a new address record, position the cursor in the Address Type field and press the arrow down key on the keyboard until a blank record is displayed. If the mailing address was marked confidential the indicator will default to the new address. However the phone number unlisted indicator does not. You would need to check with the employee to verify that they want to continue to have their phone marked unlisted.

4. Save the address changes.

Please note: Employees can log into MyVT to change their confidentiality indicators on their mailing address.

Changing the Office Address

Complete the same steps to change the office address if an employee is transferring from one office to another. The office address will not have the confidential and unlisted indicators.
Directory Information

Information posted on PeopleSearch (VT online directory) and the paper copy of the campus directory is extracted from Banner. Only staff and faculty employees will show up in the directory however you can set up wage and adjunct faculty appointments to display using the directions below for PWADREM.

There is a web report in the HRIS web reporting system (https://webapps.es.vt.edu/webreport/submit) underneath the Directory folder called Directory Listing that will allow departments to view how employee’s information will appear in the directory. If a change needs to be made to the mailing or office address please use PWAEBIO to make the change.

There are two forms specifically set up for changes to information that displays in the directory, PWAVTTL and PWADREM. PWAVTTL allows you to change the Virginia Tech title that displays in the directory. PWADREM allows you to setup or delete wage and adjunct faculty appointments to display in the directory.

Navigate to the PWAVTTL form

If needed, verify that the title is approved by a dean or department head prior to making this change. This form changes the title for the directory purposes only and the working title in Banner is not affected. This form also allows more characters in the title than the job title on PWIEMPV.

1. **Orgn**: Type your 6-digit department number.
2. **Title**: Enable the form by clicking in the title field. Scroll down to the employee whose title needs to be changed and type the current title as appropriate.
3. Continue in the same manner until all applicable titles are corrected. Save the title changes.

Navigate to the PWADREM form

This screen will allow you to setup or delete non-student wage, emergency hire and adjunct faculty to display in the directory.

1. **ID**: Type the person's ID without any spaces or hyphens.
2. **Title**: Type the title that should display in the directory for the employee.
3. **Orgn Code**: Type your 6-digit department number.
4. **Print in Directory?**: Select the check box if this record should display and save the changes.
5. **Delete Record?**: Select the check box if this record should no longer display and save the changes.

Please Note: Make sure to remove the person's information if they are no longer employed.
## Looking up Position Numbers

Use NBIPORG to see a list of position numbers that belong to the a specific department.

1. Navigate to the NBIPORG form.

<table>
<thead>
<tr>
<th>Position</th>
<th>Title</th>
<th>Status</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Type</th>
<th>Budget FTE</th>
<th>Job FTE</th>
<th>Annualized FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>P07031</td>
<td>Lecturer CY</td>
<td>A</td>
<td>09-JUL-2000</td>
<td></td>
<td>S</td>
<td>0.000</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>P07032</td>
<td>Student - Resi</td>
<td>A</td>
<td>09-JUL-2000</td>
<td></td>
<td>F</td>
<td>0.000</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>P07033</td>
<td>Work Study Student</td>
<td>A</td>
<td>09-JUL-2000</td>
<td></td>
<td>F</td>
<td>0.000</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>P07034</td>
<td>Fiscal Technician</td>
<td>A</td>
<td>09-JUL-2000</td>
<td></td>
<td>F</td>
<td>0.000</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>P07035</td>
<td>OA - Post</td>
<td>A</td>
<td>09-JUL-2000</td>
<td></td>
<td>F</td>
<td>0.000</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>P07036</td>
<td>TR-Wage PT Term Adjunct</td>
<td>A</td>
<td>09-JUL-2000</td>
<td></td>
<td>F</td>
<td>0.000</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>P07037</td>
<td>Admin and Program Spec II</td>
<td></td>
<td>25-SEP-2010</td>
<td></td>
<td>S</td>
<td>0.000</td>
<td>1.00</td>
<td></td>
</tr>
</tbody>
</table>

1. **Orgn**: Type the 6-digit department number and hit the tab key on the keyboard to populate the department's name.

2. **Position**: Click in the position number field to populate the data. Scroll down to view all the positions that belong to the department.

**Status** column will display an “A” if the position number is active and will display a “C” if the position number has been closed and can no longer be used.

**Begin Date** column will display the date when the position number was created in Banner. This is not the date of when someone was hired into this position.

**End Date** column will display the date when a position number was closed. If the position number is still active then this field will not be populated.

**Type** column will display an “S” for single position into which only one person can be hired or a “P” for pooled positions into which multiple people can be hired. Staff and faculty positions will always be single.

**Budget FTE** will display a “0”. Virginia Tech does not allocate at the individual position level. Special position allocations have been set up for budget purposes. These allocations will be displayed on this form as PAxxxx numbers (e.g., PA0431). Position allocation numbers are not used in the appointment process on NOAEPAF; they are for budget purposes only.

**Job FTE** displays the number of full-time equivalent employees currently assigned to a position (except for wage positions).
Primary vs Secondary Jobs

Please refer to Policy 4070 that pertains to Additional/Outside Employment for Salaried Classified and University Staff. If a staff employee is requesting additional employment a Request for Additional/Outside Employment (P-36) will need to be submitted to their supervisor and department head.

There are two key points to remember in creating a job in Banner. First, every employee must have a primary job. The primary job defines the employee class which determines the employee's benefits and leave options. Second, an employee may not be assigned to more than one primary job. Note the following situations which affect primary vs. secondary job status:

- If an employee is in both a salaried and a wage position, the salaried position is always considered the primary job; the wage position is secondary.
- If an employee is in more than one wage position the wage position that was entered first is generally considered to be the primary job.
- If an employee is in a graduate student position and a wage position, the graduate student position is generally considered to be the primary job.
- P-14 appointments for current university employees are secondary jobs.
- P-14 appointments which result in an original university hire or rehire situation are considered to be primary jobs.

It is important to understand this concept since you will be involved in hire actions using the electronic routing and approval features of Banner called Personnel Action Forms (PAFs).

All PAF hire actions should result in the assignment of a primary job and employee class. The employee class drives the calculation of the employee's benefits and leave options and, thus, defines the employee's primary job.

All PAF additional job actions are created as secondary jobs. The employee class set-up on the primary job remains unchanged. The additional job results in additional pay with all benefits being driven by the primary job record.

If an employee's primary job status changes, the primary job must first be terminated or contract type changed to secondary before a new primary job may be assigned (e.g., when a wage employee becomes a staff employee, the wage job record must first be terminated or contract type changed to secondary, and then the new primary job record created as the classified job). It is very important that jobs be terminated in a timely manner to facilitate the processing of all actions, both central office and departmental.

If you will be entering any additional job actions that may result in the possibility of a different primary job for an employee contact the HR Service Center at (540) 231-9331. They will coordinate any primary or secondary job changes.
**Affordable Care Act & Wage Limits**

On April 30 of each year the Standard Measurement Period, the twelve-month monitoring period of hours worked for wage, adjunct, and P-14 employees, will end. The current measurement period begins May 1. The measurement period was established by the Commonwealth of Virginia's 2013 amendment to the Manpower Control Program ($4-7.01) in response to the regulations of the federal Patient Protection and Affordable Care Act (ACA) (42 U.S.C. § 18001 et seq. (2010)).

The ACA restricts the number of hours that employees who are not eligible for health insurance benefits may work. At Virginia Tech this applies to employees in the following wage categories such as 1500 hour wage, student wage, adjunct, P-14, sporadic, and emergency hire:

- Wage employees may not work more than 1500 hours between May 1 – April 30 (no exceptions).
- Adjunct Faculty may not teach more than 10 credit hours per academic year semester.
- P-14 appointments may not work more than an average of 29 hours per week during the twelve-month measurement period.
- Student workers may not work more than an average of 29 hours per week during the twelve-month measurement period (work-study hours do not count toward totals).
- Sporadic and Emergency Hire positions are limited by nature, but a person working multiple appointments may not exceed a total of 1500 hours May 1 - April 30. All wage hours and appointments count toward the total for the 12 month period.
- Any other types of wage appointments.

Since the calculation of hours is an average over the 12-month period, some employees may exceed the 29 hours during a work week as long as the cumulative hours do not exceed 1,500. For example, an employee who is hired for a 6 month period may work 40 hours per week. However, if this same employee is re-hired within the 12-month period their previous hours worked count toward the 1,500, see below:

<table>
<thead>
<tr>
<th>Employee</th>
<th>Employment Period</th>
<th>Weekly Hours Worked</th>
<th>Cumulative Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hokie Bird</td>
<td>May 10 – November 25</td>
<td>40</td>
<td>1,120*</td>
</tr>
</tbody>
</table>

*If Hokie Bird is rehired prior to May 1 the following year, he may only work an additional 380 hours during the twelve-month period.

With the end of the measurement period approaching, you may have employees whose hours worked are nearing the 1,500 maximum limit. To review employee FTE and/or wage hours worked through the HRIS Reporting System, you can use the ‘Filled FTE by Organization’ and ‘Wage 1500 Hours Report’ reports. You or your departmental HR Banner expert should have access to these reports. It is extremely important to monitor all wage positions, but even more critical to monitor employees who may work a combination of part-time positions (such as multiple wage jobs, a P14 plus an emergency hire, P14 plus adjunct, etc.) – all wage hours worked count toward the annual limits.

Starting with the May 1, 2014 – April 30 reporting cycle, any employee who works an average of 30 hours or more per week during this measurement period will become eligible for benefits (full-time with benefits at 0.8 FTE or higher).

No exceptions or extensions will be granted. Please plan and budget accordingly.

If you have questions regarding a specific situation in your area, please contact your Employment Consultant.
Verifying Current Employment Status

Use the PWIEMPV form to verify current employment status before setting up an appointment. You will need to determine if the person is already actively employed at the university and if the person has ever been employed in the position number you are preparing to hire them into.

1. Navigate to the PWIEMPV form and type the person's ID in the ID field.

2. Position your cursor in the Employee Status field to populate the data.

If the person has never been employed with the university the fields will all be blank and “No employee or job information found for this ID” will display at the bottom of the screen.

If the person has been employed with university job data will display on the screen.

3. **Employee Status**: This field determines if the person is actively employed at the university.

4. **Position Num**: Scroll through the job records looking for the position number you are preparing to hire the person into. If the person has never been in the position number before you will use a suffix of 00 when setting up the appointment. Each time a person is rehired into the same position number the suffix increases by 1. If the person has been in the position number before make a note of the highest suffix number so that you can increase it by one when setting up the appointment.

The following provides a short definition for the remainder of the fields on the PWIEMPV form.

**Employee Status**: Indicates the status of the employee (e.g., active or terminated)

**Employee Class**: Indicates the employee class used for benefits and leave eligibility.

**Home Orgn**: Department associated with the primary position. Aside from Human Resources, only this department has access to update general person information.

**Current Hire Date**: Date the employee was hired at Virginia Tech.

**Original Hire Date**: Date the employee was hired into the Virginia state system.
Separation Date: Date the employee separated from Virginia Tech.

Adj Service Date/Leave Accural: Date used to calculate state service and leave accruals.

Last Paid Date: Date the employee last received their paycheck.

Position Num: Number assigned to the position. A position number and unique suffix (displayed to the right of the position number) is assigned for each job an employee occupies.

   An employee may have more than one job with the same position number. The suffix further defines the job. 00 (zeros) will typically display the first time the position number is assigned to the individual, 01 will display the second time it is assigned, etc.

   In addition special character suffixes assigned by Human Resources may display. These define the following special situations:

   EL:    Educational leave - Also used for ITO agreements so that the employee's combined jobs result in a full-time appointment and benefits are maintained.

   ES:    Eminent Scholar - Cash earning with life insurance and retirement calculated.

   LS:    Leave Sharing (when the employee is on LWOP and eligible for leave sharing, a second job is established for the leave sharing and benefits are not deducted from the LS job). This is a cash earning but without benefits.

   NS:   Non-state salary paid directly to our county extension agents. This is non-cash earning.

   AS:   Assignment Special Rate - Any additional differential payment such as acting department head. This is cash earning with total amount calculated for life insurance and retirement.

Role Title: Role title of the position.

Band: Pay band of the position.

Job Title: Job title of the position. This is the title that the department gives the employee.

Job Class Desc: Description of the employee class that the position belongs to.

Job Orgn: Department number that this position belongs to.

Orgn Desc: Department name that this position belongs to.

Begin/End Date: Begin and end date, as appropriate, of the job. Jobs with begin dates prior to Jan. 1, 1997 will display a begin date of Jan. 1, 1997 due to system conversion.

FTE: Full Time Equivalency that the employee is working in this job (e.g. 1 for full time, .5 for half-time). Wage positions do not have an FTE.

Rate: Annual salary for salaried employees, hourly rate for wage employees, and pay period amount for graduate assistants, adjunct faculty (P14) and other employees receiving special payments.

Other Earnings: Any additional earnings that are not included as part of the base pay.

Non State Sal: Any earnings that are paid directly from non-state sources (e.g., funds paid to an extension agent by a county).

Wage Date: Date that is used for wage employees to begin counting their hours toward the 1500 hour limit.
**Total Wage Hours:** Total accumulated hours during the May 1 - April 30 cycle.

**Visa Type:** Employee's visa type.

**Visa Expire Date:** Date the visa expires.

**Job Labor Distribution:** To view funding information for a job click on the Job Labor Distribution tab or select Job Labor Distribution in the Options menu at the top of the menu bar.

---

**Effective Date:** Effective date of funding. It will also display any future funding changes.

**Index:** Fund index number.

**Description:** Description of the fund.

**Project End Date:** Displays the end date, if any, for the fund.

**Orgn Code:** Organization to whom the fund belongs.

**Account Code:** Account for this fund.

**Fund Code:** Fund for the job.

**Prog Code:** CARS program/sub-program code used primarily for expenditure classification.

**Actv Code:** Activity code.

**Locn Code:** Location code used primarily for fixed assets.

**Proj Code:** Not currently used.

**Ctyp Code:** Not currently used.

**Percent:** Percentage of total funding paid by this fund index number.
Non-Student Wage and Sporadic Hire Appointments

Follow these steps to set up a non-student wage appointment after creating or updating the biographical record (PWAEBIO), looking up the position number (NBIPORG), verifying the current employment status and determining if the new employee has ever been employed in the position number. This process is called the PAF (Personnel Action Form).

Please Note: A conviction check needs to be completed before a wage appointment can be entered. This is required by University Policy 4060.

Forms Needed (Maintain in your departmental files):
- Wage Employee Appointment Record (P12W)
- Offer Letter for Wage Positions (only for non-student wage appointments)

Payroll Steps
- Employee completes W4 and VA4 tax forms.
- Department and employee completes the Online I-9 (Employment Eligibility Verification).
- Department makes a copy of the employee's social security card.
- Department submits W4, VA4 and copy of social security card to the Payroll Office (Mail Code 0339).

The employee will also need to go to MyVT (http://my.vt.edu) to sign up for direct deposit.

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOAEPAF tab.

2. ID: If needed, type the person's ID number without any spaces or hyphens.

3. Query Date: Type the effective date of the appointment (person's first day of employment).

4. Approval Cat: Type or select from the list of values WAHIRE (if the person does not have a current active job) or WAJOB (if the person does have a current active job).

5. Approval Type: WAHIRE or WAJOB will default into this field.

6. Position: Type the wage position number identified on NBIPORG. If you do not type in a non-student wage or sporadic hire position number, “Approval category invalid for position, empl class” will display.

7. Suffix: Type the appropriate suffix number. 00 (zeros) for the first time a person is assigned to a position, 01
for the second time, etc.

8. **New Value**: Click in the first empty field beneath New Value.

9. **Alternate Password**: Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.

10. **Employee Class Code**: If you are setting up a WAHIRE, 6A (Non-student Wage) will display as the default. You will need to change it to 6F if setting up a sporadic hire appointment. If you are setting up a WJOB this field will not display.

11. **Home Organization and Distribution Organization**: If you are setting up a WAHIRE, these two fields will display. Type your 6-digit department number.

12. **Timesheet Orgn**: If you are setting up a WJOB, this field will display. Type your 6-digit department number.

13. **Regular Rate**: Type the hourly rate of pay with no dollar sign.

14. **Time Clock Job Code**: This is used for departments who have the TimeClock Plus system to track wage hours. To populate this field put your cursor in the field and click on the arrow button beneath New Value to see a list of options. Once you have found the correct code highlight it and click on OK. If Payroll has granted an exception, the dummy job code (999999999) can be entered on the PAF.

15. The remaining fields will auto-populate with the correct information.

16. Save the first step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.
17. **Next Action:** From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to FUND. This is the second step of this PAF process.

18. **New Value:** Click in the first empty field beneath New Value.

19. A split screen of funding information will appear, normally with default information.

20. **COAS:** This field will display with a default of U (University).

21. **Index:** Indicates the funding number to be charged. Type over to change, if needed.

22. **Percent:** Indicates percent charged to the funding number. Type over to change, if needed. Add additional funding and percent numbers if split funding is desired. Position the cursor in the index field and arrow down for additional record rows.

23. Save the second step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

24. **Routing Information:** From the Options menu select Routing to go to the next step of the PAF.

25. **UserID:** In the APPR10 row, enter the PID of your department approver. To search for a PID place the cursor in the UserID field and click on the down arrow button. In the PERSNL 90 row it will display PAYAPPLY.

26. Save the third step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

27. **Submit Transaction:** From the Options menu select Submit Transaction. Verify that the Transaction Status field has changed from Waiting to Pending.
Emergency Hire Appointments

Follow these steps to set up an emergency hire appointment after creating or updating the biographical record (PWAEBIO), looking up the position number (NBIPORG), verifying the current employment status and determining if the new employee has ever been employed in the position number. This process is called the PAF (Personnel Action Form).

Please Note: A **conviction check** needs to be completed before a wage appointment can be entered. This is required by **University Policy 4060**.

**Forms Needed** (Maintain in your departmental files):
- Wage Employee Appointment Record (P12W)

**Payroll Steps**
- Employee completes **W4 and VA4 tax forms**.
- Department and employee completes the Online I-9 (Employment Eligibility Verification).
- Department makes a copy of the employee’s social security card.
- Department submits W4, VA4 and copy of social security card to the Payroll Office (Mail Code 0339).

The employee will also need to go to MyVT (http://my.vt.edu) to sign up for direct deposit.

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOAEPAF tab.

2. **ID**: If needed, type the person's ID number without any spaces or hyphens.

3. **Query Date**: Type the effective date of the appointment (person's first day of employment).

4. **Approval Cat**: Type or select from the list of values EMHIRE (if the person does not have a current active job) or EMJOB (if the person does have a current active job).

5. **Approval Type**: EMHIRE or EMJOB will default into this field.

6. **Position**: Type the emergency hire position number identified on NBIPORG. If you do not type in an emergency hire position number, “Approval category invalid for position, empl class” will display.

7. **Suffix**: Type the appropriate suffix number. 00 (zeros) for the first time a person is assigned to a position, 01 for the second time, etc.
8. **New Value**: Click in the first empty field beneath New Value.

9. **Alternate Password**: Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.

10. **Employee Class Code**: If you are setting up an EMHIRE, 6E (Emergency Hire) will display as the default. If you are setting up an EMJOB this field will not display.

11. **Home Organization and Distribution Organization**: If you are setting up an EMHIRE, these two fields will display. Type your 6-digit department number.

12. **Timesheet Orgn**: If you are setting up an EMJOB, this field will display. Type your 6-digit department number.

13. **Regular Rate**: Type the hourly rate of pay with no dollar sign.

14. **Title**: Type the job title using mixed case (e.g., Fiscal Technician).

15. **Time Clock Job Code**: This is used for departments who have the TimeClock Plus system to track wage hours. To populate this field put your cursor in the field and click on the arrow button beneath New Value to see a list of options. Once you have found the correct code, highlight it and click on OK. If Payroll has granted an exception, the dummy job code (999999999) can be entered on the PAF.

16. The remaining fields will auto-populate with the correct information.

17. Save the first step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

18. **Next Action**: From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to FUND. This is the second step of this PAF process.
19. **New Value**: Click in the first empty field beneath New Value.

20. A split screen of funding information will appear, normally with default information.

![Current Job Labor Distribution Table](Image1)

21. **COAS**: This field will display with a default of U (University).

22. **Index**: Indicates the funding number to be charged. Type over to change, if needed.

23. **Percent**: Indicates percent charged to the funding number. Type over to change, if needed. Add additional funding and percent numbers if split funding is desired. Position the cursor in the index field and arrow down for additional record rows.

24. Save the second step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

25. **Next Action**: From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to JOBEND. This is the third step of this PAF process.

26. **New Value**: Click in the first empty field beneath New Value.

![Applied Status Table](Image2)

27. **Jobs Effective Date**: This field will default to a date that is 130 calendar days after the begin date. This is the effective date that this emergency hire appointment will terminate. This date cannot be changed on this screen.

28. **Job Status**: T (Terminated) displays as the default.

29. Save the third step.
30. **Routing Information**: From the Options menu select Routing to go to the next step of the PAF.

31. **UserID**: In the APPR10 row enter the PID of your department approver. To search for a PID place the cursor in the UserID field and click on the down arrow button. In the PERSNL 90 row it will display PAYAPPLY.

32. Save the fourth step of the PAF. The hint line should display “Transaction Complete: Records applied and saved.”

33. **Submit Transaction**: From the Options menu select Submit Transaction. Verify that the Transaction Status field has changed from Waiting to Pending.

34. **Notify**: Notify your department approver. The approval must take place prior to the wage payroll schedule deadline date for a timecard to be generated and the employee to be paid on time.
Student Wage and Work Study Appointments

Follow these steps to set up an undergraduate student appointment after updating the biographical record (PWAEBIO), looking up the position number (NBIPORG), verifying the current employment status and determining if the new employee has ever been employed in the position number. This process is called the PAF (Personnel Action Form).

Please Note: When looking up position numbers in NBIPORG student wage and work study student positions have separate position numbers and are treated like separate jobs.

Forms Needed (Maintain in your departmental files):
- Wage Employee Appointment Record (P12W) - Only the appointment section needs to be completed

Payroll Steps
- Employee completes W4 and VA4 tax forms.
- Department and employee completes the Online I-9 (Employment Eligibility Verification).
- Department makes a copy of the employee’s social security card.
- Department submits W4, VA4 and copy of social security card to the Payroll Office (Mail Code 0339).

The student employee will also need to go to MyVT (http://my.vt.edu) to sign up for direct deposit.

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOAEPF tab.

2. ID: If needed, type the person's ID number without any spaces or hyphens.
3. Query Date: Type the effective date of the appointment (first day the person will work).
4. Approval Cat: Type or select from the list of values STHIRE (if the person does not have a current active job) or STJOB (if the person does have a current active job).
5. Approval Type: STHIRE or STJOB will default into this field.
6. Position: Type the student or work study position number identified on NBIPORG. If you do not type in a student or work study position number, “Approval category invalid for position, empl class” will display.
7. Suffix: Type the appropriate suffix number. 00 (zeros) for the first time a person is assigned to a position, 01 for the second time, etc.
8. **New Value**: Click in the first empty field beneath New Value.

9. **Alternate Password**: Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.

10. **Employee Class Code**: If you are using an approval category of STHIRE, type the appropriate class code. If you are setting up an STJOB this field will not display.
    
    6B (Student Wage)
    6C (Federal Work Study)

11. **Home Organization and Distribution Organization**: If you are setting up an STHIRE, these two fields will display. Type your 6-digit department number.

12. **Timesheet Orgn**: If you are setting up an STJOB, this field will display. Type your 6-digit department number.

13. **Regular Rate**: Type the hourly rate of pay with no dollar sign.

14. **Title**: Type the job title using mixed case (e.g., Fiscal Technician).

15. **Time Clock Job Code**: This is used for departments who have the TimeClock Plus system to maintain wage hours. To populate this field put your cursor in the field and click on the arrow button beneath New Value to see a list of options. Once you have found the correct code, highlight it and click on OK. If Payroll has granted an exception, the dummy job code (999999999) can be entered on the PAF.

16. The remaining fields will auto-populate with the correct information.

17. Save the first step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

18. **Next Action**: From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to FUND. This is the second step of this PAF process.
19. **New Value**: Click in the first empty field beneath New Value.

20. A split screen of funding information will appear, normally with default information.

21. **COAS**: This field will display with a default of U (University).

22. **Index**: Indicates the funding number to be charged. Type over to change, if needed. **Please Note**: For work study positions, 75% of the funding is paid from financial aid and 25% from the department. Do not change the percentage or funding for financial aid.

23. **Percent**: Indicates percent charged to the funding number. Type over to change, if needed. Add additional funding and percent numbers if split funding is desired. Position the cursor in the index field and arrow down for additional record rows.

24. Save the second step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

25. **Routing Information**: From the Options menu select Routing to go to the next step of the PAF.

26. **UserID**: In the APPR10 row enter the PID of your department approver. To search for a PID place the cursor in the UserID field and click on the down arrow button. In the PERSNL 90 row it will display PAYAPPLY.

27. Save the third step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

28. **Submit Transaction**: Select Submit Transaction from the Options menu. Verify that the Transaction Status field has changed from Waiting to Pending.

29. **Notify**: Notify your department approver. The approval must take place prior to the wage payroll schedule deadline date for a timecard to be generated and the employee to be paid on time.
**Work Study Student Process**

1. Verify that the student has been awarded financial aid for a work study student position by checking their financial aid on RJASEAR in Banner. If there is a balance then a work study position can be created.

2. Submit a job appointment PAF using the work study student position number.

3. After the PAF has been approved and applied verify the job exists on PWIEMPV (Employment Verification) form in Banner.

4. Student’s hours are entered or uploaded from TimeClock Plus into PHA HOUR every pay period.

5. Departments will need to check the Financial Aid Balance report (in the HRIS web reporting system under the Verificiation folder) every pay period to make sure that there is enough to pay the work study student for the upcoming pay period.

6. Submit PAF to job end work study student position when the financial balance reaches zero or if the student terminates their employment


Office of University Scholarships and Financial Aid

[http://www.finaid.vt.edu](http://www.finaid.vt.edu)

Phone: (540) 231-5179  Email: finaid@vt.edu
Graduate Assistantships

Types of Assistantships
There are three types of graduate assistantships: general Graduate Assistantships, Graduate Teaching Assistantships and Graduate Research Assistantships.

Graduate Assistantships (GA) are graduate students who provide academic and program support. GA responsibilities may be administrative in nature and consist of duties unrelated directly to teaching or research (such as academic advising, program planning, advising student groups, and assisting with the administration of student services offices). GA responsibilities may also be academic in nature and include grading examinations, problem sets, and/or lab assignments, setting up displays for lectures or laboratory sections, and preparing or maintaining equipment used in laboratory sections.

Graduate Teaching Assistantships (GTA) provide academic program support under the supervision of a faculty member. GTAs may assist faculty in the department in teaching undergraduate courses, including laboratory teaching assignments, or in providing other appropriate professional assistance, including grading examinations, problem sets, and/or lab assignments, setting up displays for lectures and laboratory sections, and preparing or maintaining equipment used in laboratory sections. GTAs must have 18 hours of graduate-level course work completed in their teaching disciplines to be assigned full responsibility for teaching an undergraduate course. GTAs lacking this training will be assigned to work under the supervision of a faculty member who will be the instructor of record for the course.

Graduate Research Assistantships (GRA) are graduate students conducting academically significant research under the direction of a faculty member, who is generally a principal investigator on an external grant or contract. Graduate Research Assistantships are awarded by departments and professors who are engaged in research projects. Research assistantships offer exciting opportunities to participate in ongoing research developments at Virginia Tech. Since GRAs are often funded by sponsored research grants, they may be paid at a higher stipend level than GAs or GTAs.

Assistantship Eligibility Requirements

- Students must be enrolled in 12-18 credit hours
- Maintain a 3.0 GPA to hold assistantships; departmental requirements may be higher
- Make satisfactory progress toward degree as defined by academic departments and the Graduate School
- Meet requirements to be eligible for employment in the U.S.

A full assistantship requires a student to work for 20 hours per week on average. Departments may offer partial assistantships.

Compensation for Graduate Students
Graduate students who work as graduate assistants while pursuing their master's or doctoral degrees provide a valuable service to the university. Many teach undergraduate classes. Others support faculty in scholarly and sponsored research activities. To be competitive in the recruitment and retention of high quality graduate students, it is important for the University to provide compensation packages that are comparable with those offered by our peer institutions. The key components of the compensation packages are competitive stipends, tuition assistance, and health insurance.

The Full-Time Graduate Monthly Stipend Table can be found at [http://graduateschool.vt.edu/](http://graduateschool.vt.edu/)
Assistantship Agreement Contract

Students offered an assistantship must sign the Graduate Assistantship Agreement form which is a contract between the student and department. The agreement should stipulate the beginning and ending dates of the contract, the type of appointment, the amount of the monthly stipend, whether the student is expected to work during school breaks, and any other special conditions. The agreement also indicates whether a tuition scholarship, academic fee, and engineering fee will be paid by the department, and whether or not the out-of-state portion of the tuition (UF Differential) will be waived.

Taxes: Federal and state taxes, if applicable, are withheld from the assistantship stipend check which is issued semi-monthly at approximately the first and sixteenth of each month. Students on summer assistantships who are not enrolled will be taxed at a higher non-student rate.

Assistantship Contract Dates

Assistantship dates are the same each year and are as follows:

<table>
<thead>
<tr>
<th></th>
<th>CONTRACT DATES</th>
<th>BANNER ENTRY DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Year</td>
<td>August 16 - May 15</td>
<td>August 10 - May 9</td>
</tr>
<tr>
<td>Fall Semester</td>
<td>August 16 - Dec. 31</td>
<td>August 10 - Dec. 24</td>
</tr>
<tr>
<td>Spring Semester</td>
<td>January 1 - May 15</td>
<td>Dec. 25 - May 9</td>
</tr>
<tr>
<td>Summer Semester</td>
<td>May 16 - August 15</td>
<td>May 10 - Aug. 9</td>
</tr>
</tbody>
</table>

Departments must specify whether a student is to work over school or semester breaks. Students may be offered assistantships at any time of year. The tuition scholarship will be pro-rated for the remainder of the term in which a student is hired.

GA Appointments

Follow these steps to set up a graduate assistantship appointment after updating the biographical record (PWAEBIO), looking up the position number (NBIPORG), verifying the current employment status and determining if the new employee has ever been employed in the position number. This process is called the PAF (Personnel Action Form).

Forms Needed (Maintain in your departmental files):
- Wage Employee Appointment Record (P12W) - If biographical information is needed
- Signed Graduate Assistantship Agreement

Payroll Steps
- Employee completes W4 and VA4 tax forms.
- Department and employee completes the Online I-9 (Employment Eligibility Verification).
- Department makes a copy of the employee's social security card.
- Department submits W4, VA4 and copy of social security card to the Payroll Office (Mail Code 0339).

The student employee will also need to go to MyVT (http://my.vt.edu) to sign up for direct deposit.

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOAEPF tab.

2. ID: If needed, type the person's ID number without any spaces or hyphens.

3. Query Date: Type the effective date of the appointment. Use the first day of a salary pay period to prevent prorating the first payment amount.

4. Approval Cat: Type or select from the list of values GAHIRE (if the person does not have a current active job) or GAJOB (if the person does have a current active job).

Note: Graduate students must meet enrollment and QCA requirements in order to be set up using GAHIRE or GAJOB. If the student does not meet the requirements Banner will display an error message and you will need to use GEXHIR or GEXJOB. These codes will require an extra line of routing form for the Graduate School to approve the action (GRADAPPR).

5. Approval Type: GAHIRE or GAJOB will default into this field.
6. **Position:** Type the graduate position number (GA, GTA or GRA) identified on NBIPORG. If you do not type in a graduate position number, “Approval category invalid for position, empl class” will display.

7. **Suffix:** Type the appropriate suffix number. 00 (zeros) for the first time a person is assigned to a position, 01 for the second time, etc.

8. **New Value:** Click in the first empty field beneath New Value.

9. **Alternate Password:** Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.

10. **Employee Class Code:** For a GAHIRE, 7A (GA) displays as the default.

11. **Home Organization and Distribution Organization:** If you are setting up a GAHIRE, these two fields will display. Type your 6-digit department number.

12. **Timesheet Orgn:** If you are setting up a GAJOB, this field will display. Type your 6-digit department number.

13. **Regular Rate:** Type the amount per pay period that the person should receive.

14. **FTE:** 1 displays as the default, which indicates a full-time graduate appointment (20 hrs per week) during the time it is effective. The FTE does not affect the rate of pay. Type a number less than 1 if the appointment is less than 20 hrs per week (i.e., type .5 for a 1/2 appointment (10 hrs per week), type .75 for a 3/4 time appointment (15 hrs per week), etc.)

15. The remaining fields will auto-populate with the correct information.

16. Save the first step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.
17. **Next Action**: From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to FUND. This is the second step of this PAF process.

18. **New Value**: Click in the first empty field beneath New Value.

19. A split screen of funding information will appear, normally with default information in the New Job Labor Distribution section.

20. **COAS**: This field will display with a default of U (University).

21. **Index**: Indicates the funding number to be charged. Type over to change, if needed.

22. **Percent**: Indicates percent charged to the funding number. Type over to change, if needed. Add additional funding and percent numbers if split funding is desired. Position the cursor in the index field and arrow down for additional record rows.

23. Save the funding step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

24. **Next Action**: From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to JOBEND. This is the third step of this PAF process.

25. **New Value**: Click in the first empty field beneath New Value.

26. **Jobs Effective Date**: Type the GA appointment end date. Use the last day of a salary pay period to prevent prorating the last payment amount.

27. **Job Status**: T (Terminated) displays as the default.
28. Save the funding step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

29. **Routing Information:** From the Options menu select Routing to go to the next step of the PAF.

30. **UserID:** In the APPR10 row enter the pid of your department approver. To search for a PID position the cursor in the UserID field and click on the down arrow button. In the PERSNL 90 row it will display PAYAPPLY.

   **Note:** If you are using GEXHIR or GEXJOB enter GRADAPPR in the GRAD 70 row. You may also want to click on Other Information and Comments tab and type the reason for the exception followed by your name and date for the graduate school to review.

31. Save the fourth step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

32. **Submit Transaction:** From the Options menu select Submit Transaction. Verify that the Transaction Status field has changed from Waiting to Pending.

33. **Notify:** Notify your department approver. The approval must take place prior to the salary payroll schedule deadline date for a timecard to be generated and the employee to be paid on time.
GA Appointment Extensions

Follow these steps to extend a graduate assistantship job when the appointment has been extended without a break in service and the pay rate has not changed.

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOAEPAF tab.

   ![Image]

2. **ID**: If needed, type the person's ID number without any spaces or hyphens.

3. **Query Date**: Type the date that the job is to become active again. This date should be the day after the current termination date. For example if the appointment ends on May 9 use May 10 as the query date.

4. **Approval Cat**: Type or select from the list of values GAXTND.

5. **Approval Type**: GAXTND will default into this field.

6. **Position**: Type the position number that will be extended identified on PWIEMPV.

7. **Suffix**: Type the suffix number of the position that will be extended identified on PWIEMPV.

8. **New Value**: Click in the first empty field beneath New Value.

9. **Alternate Password**: Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.

   ![Image]

10. **Job End Date**: Field will display a dash and will not allow any entry.
11. **Job Status**: A (Active) displays as the default.

12. **Jobs Effective Date**: This field displays a default value based on the query date.

13. **Job Change Reason**: This field will display a default value of GAAPX.

14. Save the first step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

15. **Next Action**: From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to JOBEND. This is the second step of this PAF process.

16. **New Value**: Click in the first empty field beneath New Value.

17. **Jobs Effective Date**: Type the new date that the graduate assistantship appointment will end. Use the last day of a pay period to prevent prorating the last payment amount.

18. Save the second step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

19. **Next Action**: From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to FUND. This is the third step of this PAF process.

20. **New Value**: Click in the first empty field beneath New Value.

21. A split screen of funding information will appear, normally with default information in the New Job Labor Distribution section.
22. **COAS**: This field will display with a default of U (University).

23. **Index**: Indicates the funding number to be charged. Type over to change, if needed.

24. **Percent**: Indicates percent charged to the funding number. Type over to change, if needed. Add additional funding and percent numbers if split funding is desired. Position the cursor in the index field and arrow down for additional record rows.

25. Save the funding step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

26. **Routing Information**: From the Options menu select Routing to go to the next step of the PAF.

27. **UserID**: In the APPR10 row enter the PID of your department approver. To search for a PID, position the cursor in the UserID field, and click on the down arrow button. In the PERSNL 90 row it will display PAYAPPLY.

28. Save the fourth step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

29. **Submit Transaction**: From the Options menu select Submit Transaction. Verify that the Transaction Status field has changed from Waiting to Pending.
30. **Notify**: Notify your department approver. The approval must take place prior to the salary payroll schedule deadline date for a timecard to be generated and the employee to be paid on time.
Graduate Fellowships

Follow these steps to set up a graduate fellowship appointment after updating the biographical record (PWAEBIO), looking up the position number (NBIPORG) and determining if the person has ever received a graduate fellowship from your department before.

**Note:** Departments must have a fellowship position (STPxxx) set up to perform these steps. If a position number needs to be created please contact the HR Service Center. For procedures about fellowships visit this website: [http://www.controller.vt.edu/content/dam/controller_vt_edu/procedures/payroll/23800.pdf](http://www.controller.vt.edu/content/dam/controller_vt_edu/procedures/payroll/23800.pdf).

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOAEPAF tab.

2. **ID:** If needed, type the person's ID number without any spaces or hyphens.

3. **Query Date:** Type the effective date of the appointment. Use the first day of a salary pay period to avoid prorating the first payment amount.

4. **Approval Cat:** Type or select from the list of values STPHIR (if the person does not have a current active job) or STPJOB (if the person does have a current active job).

5. **Approval Type:** STPHIR or STPJOB will default into this field.

6. **Position:** Type the graduate fellowship (STPxxx) position number identified on NBIPORG. If you do not type in a stipend position number, “Approval category invalid for position, empl class” will display.

7. **Suffix:** Type the appropriate suffix number. 00 (zeros) for the first time a person is assigned to a position, 01 for the second time, etc.

8. **New Value:** Click in the first empty field beneath New Value.

9. **Alternate Password:** Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.
10. **Employee Class Code:** For STPHIR, ST (Stipend) displays as the default.

11. **Home Organization and Distribution Organization:** Type your 6-digit department number.

12. **Regular Rate:** Type the amount of pay per pay period with no dollar sign.

13. The remaining fields will auto-populate with the correct information.

14. Save the first step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

15. **Next Action:** From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to FUND. This is the second step of this PAF process.

16. **New Value:** Click in the first empty field beneath New Value.

17. A split screen of funding information will appear, normally with default information.

18. **COAS:** This field will display with a default of U (University).

19. **Index:** Indicates the funding number to be charged. Type over to change, if needed.

20. **Percent:** Indicates percent charged to the funding number. Type over to change, if needed. Add additional funding and percent numbers if split funding is desired. Position the cursor in the index field and arrow down for additional record rows.
21. Save the funding step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

22. **Next Action**: From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to JOBEND. This is the third step of this PAF process.

23. **New Value**: Click in the first empty field beneath New Value.

24. **Jobs Effective Date**: Type the end date of the appointment. Use the last day of a salary pay period to prevent prorating the last payment amount.

25. Save the third step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

26. **Routing Information**: From the Options menu select Routing to go to the next step of the PAF.

27. **UserID**: In the APPR10 row enter the PID of your department approver. To search for a PID position the cursor in the UserID field and click on the down arrow button. In the PERSNL 90 row it will display PAYAPPLY.

28. Save the routing information. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

29. **Submit Transaction**: From the Options menu select Submit Transaction. Verify that the Transaction Status field has changed from Waiting to Pending.

30. **Notify**: Notify your department approver. The approval must take place prior to the stipend payroll schedule deadline date for a timecard to be generated and the employee to be paid on time.
Undergraduate Fellowship Payments

Undergraduates (not graduates) who participate in special educational enrichment and research training programs during the academic year or the summer at Virginia Tech are eligible to receive funds through the Undergraduate Fellowship Disbursement Process (Payroll ST) if there is no work requirement. In the past these disbursements were primarily made through Accounts Payable.

Please Note: If the student is providing work for service, i.e. not involved in training but completing a specific list of tasks (washing glassware, providing animal care, gathering literature for the researcher, etc.) then they should be hired as a student wage (for enrolled VT students) or emergency hire (non-VT students).

The undergraduate fellowship process mirrors what is currently used for graduate students. Departments who host programs that fit the requirements should have fellowship positions (STUxxx) listed in NBIPORG in Banner. Approval of fellowship disbursement transactions are handled by the Office of Undergraduate Research with support from the Office of the Vice President for Research. Please read Procedure 23800 for procedures, restrictions and processing - http://www.controller.vt.edu/content/dam/controller_vt_edu/procedures/payroll/23800.pdf

Scholarships should continue to be paid through the student account using the “Request to Pay Funds to a Student Account” form on the Bursar’s website. According to the IRS, a scholarship is generally an amount paid or allowed to a student at an educational institution for the purpose of study.

Payroll Schedule
Undergraduate fellowships are processed under the stipend (ST) payroll.

Required Documents

Fellowship Information Supplement (P-12F) Please Note: If a foreign national, the student may be taxed monthly though the Accounts Receivable Office for amounts due the IRS. Please obtain the following documents from all foreign nationals: Foreign National Data Form, Copies of: passport, visa, I-94, I-20 or DS2019, SSN or ITIN if applicable. Documents should be forwarded to the International Tax Specialist in the Controller’s Office/Payroll (0339). Here is a website with taxability information - http://www.finaid.org/scholarships/taxability.phtml

An email or Undergraduate Fellowship Payment Record (SU) form containing fellowship information such as rate, funding, etc. for payment.

PAF Begin and End Dates
There are 3 possibilities in which a fellowship can be entered and they include:

One-time Payment - If a one time payment will be given then the query date and jobs effective end date on the PAF will need to be for one salary pay period (Example: May 10 - 24). The rate will be the total amount to be paid.

Multi Payments - If multi payments will be given (payment given at beginning, middle and end) then a PAF will need to be entered for each payment and the query date and jobs effective end date on each PAF will need to be for one salary pay period (Example: 1st PAF: May 10 - 24; 2nd PAF: June 10 - 24; 3rd PAF: July 25 - August 9). The rate will be the total amount divided by the number of payments ($900 / 3 = $300).

Continuous Payments - If a continuous payment will be given through a particular timeframe (ex. May - July) then the query date on PAF should be the first day of a salary pay period (ex. May 10) and the jobs effective end date should be the last day of a salary pay period (ex. July 24). The rate will be the total amount divided by the number of pay periods ($1000 / 5 = $200).
**Funding**
Fellowship payments should be charged to sponsored or private funds. If a fund number that is being used starts with a 1 or 2 (operating or overhead funds) then an email will need to be sent to Wendell Vest in the Controller’s office for approval prior to the fellowship being entered in Banner.

**PAF Comments**
Comments are required to be entered in the Other Information and Comments tab on PAF to explain the nature of the fellowship.

- Program name and Funding agency, (e.g. NSF REU Site: Wireless@VT)
- Program website
- Faculty/Admin contact
- Explain the structure and elements of the opportunity (how this experience contributes to the development of the student (i.e. Why it is training as opposed to work)
- Link to the program website
- Faculty director/mentor information
- Any other relevant details (program dates, etc if not on website or no website exists, etc)

If it is for one of the pre-approved programs listed below please put your program name, funding agency, (e.g. NSF REU Site: Wireless@VT) and the website in the comments box.

- **Fralin Life Science Institute Summer Undergraduate Research Fellowship**
- **Howard Hughes Medical Institute Scineeering**
- **Louis Stokes Alliance for Minority Participation**
- **Multicultural Academic Opportunities Program Summer Research Internship**
- **Ronald E. McNair Post-baccalaureate Achievement Program**
- **National Science Foundation Research Experiences for Undergraduates (Sites and Supplements)**
- **National Science Foundation Research Experiences for Teachers (RET)**

**PAF Approval**
Undergraduate fellowship PAFs will be routed to the department approver and the Undergraduate Research. Please be aware that the deadline to have the PAF submitted to Undergraduate Research is 5 business days prior to the deadline date on the stipend payroll schedule.

If you would like clarification on what qualifies for undergraduate fellowship payment, please contact Jill Sible in Undergraduate Research at siblej@vt.edu or 231-0372. The office website is [http://www.research.undergraduate.vt.edu/office-of-undergraduate-research.html](http://www.research.undergraduate.vt.edu/office-of-undergraduate-research.html)
Undergraduate Fellowship Appointments

Follow these steps to set up an undergraduate fellowship payment after creating/updating the biographical record and looking up the position number in NBIPORG. Please Note: Departments must have an undergraduate fellowship position (STUxxx) set up to perform these steps. If a position needs to be created please contact the HR Service Center.

Forms Needed (Maintain in your departmental files):

- An email or Undergraduate Fellowship Payment Record (SU) form containing fellowship information.
- Fellowship Information Supplement (P-12F)

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOAEPAF tab.

2. ID: If needed, type the person's ID number without any spaces or hyphens.

3. Query Date: Type the beginning effective date of the payment. Use the first day of a salary pay period to avoid prorating the first payment amount. If this is for a one-time payment enter the query date and jobs effective end date on the PAF for one salary pay period (ex. May 10 - 24).

4. Approval Cat: Type or select from the list of values UGFHIR (if the person does not have a current active job) or UGFJOB (if the person does have a current active job).

5. Approval Type: STPHIR or STPJOB will default into this field.

6. Position: Type the fellowship position number (STUxxx) identified on NBIPORG. If you do note type in a fellowship position number "Approval category invalid for position, empl class" will display.

7. Suffix: Type the appropriate suffix number. 00 (zeros) for the first time a person is assigned to this position number, 01 for the second time, etc.

8. New Value: Click in the first empty field beneath New Value.

9. Alternate Password: Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.
10. **Employee Class Code**: For UGSHIR, SU (Fellowship) displays as the default.

11. **Home Organization and Distribution Organization**: For UGFHIR these two fields will display, type your 6-digit department number.

12. **Regular Rate**: Type the amount of pay per pay period with no dollar sign. If this is for a one-time payment then enter the amount that is to be paid for one pay period.

13. The remaining fields will auto-populate with the correct information.

14. Save the first step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

15. **Next Action**: From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to FUND. This is the second step of this PAF process.

16. **New Value**: Click in the first empty field beneath New Value.

17. A split screen of funding information will appear, normally with default information.
18. **COAS**: This field will display with a default of U (University).

19. **Index**: Indicates the funding number to be charged. Type over to change, if needed.

20. **Percent**: Indicates percent charged to the funding number. Type over to change, if needed. Add additional funding and percent numbers if split funding is desired. Position the cursor in the index field and arrow down for additional record rows.

21. Save the funding step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

22. **Next Action**: From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to JOBEND. This is the third step of this PAF process.

23. **New Value**: Click in the first empty field beneath New Value.

24. **Jobs Effective Date**: Type ending effective date of the payment. Use the last day of a salary pay period to prevent prorating the last payment amount.

25. Save the job end step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.
26. **Comments**: Additional information is needed so that the fellowship can be completed. Select Other Information and Comments tab and use the text box to enter justification for the fellowship.

If one of the pre-approved programs:
- **Fralin Life Science Institute Summer Undergraduate Research Fellowship**
- **Howard Hughes Medical Institute Scienceering**
- **Louis Stokes Alliance for Minority Participation**
- **Multicultural Academic Opportunities Program Summer Research Internship**
- **Ronald E. McNair Post-baccalaureate Achievement Program**
- **National Science Foundation Research Experiences for Undergraduates (Sites and Supplements)**
- **National Science Foundation Research Experiences for Teachers (RET)**

- Program name and Funding agency, (e.g. NSF REU Site: Wireless@VT)
- Program website
- Faculty/Admin contact

If not one of the pre-approved programs:
- Explain the structure and elements of the opportunity (how this experience contributes to the development of the student (i.e. Why it is training as opposed to work)
- Link to the program website
- Faculty director/mentor information
- Any other relevant details (program dates, etc if not on website or no website exists, etc)

The Undergraduate Research will review these comments. This is the fourth step of the PAF process.

27. Save the transaction comments. From the Options menu select Transaction to go back to the transaction screen.

28. **Routing Information**: From the Options menu select Routing to go to the next step of the PAF.
29. **UserID**: In the APPR10 row enter the PID of your department approver. To search for a PID, position the cursor in the UserID field, and click on the down arrow button. If needed in the APPR60 row enter UGRESAPPR, this will route the PAF to Undergraduate of Research for their approval. If needed in the PERSNL 90 row enter PAYAPPLY.

30. Save the routing information. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

31. **Submit Transaction**: From the Options menu select Submit Transaction. **Verify that the Transaction Status field has changed from Waiting to Pending.**

32. **Notify**: Notify your department approver. The approval must take place prior to the fellowship payroll schedule deadline date for a timecard to be generated and the employee to be paid on time. **Please be aware** that the deadline to have the PAF submitted to Undergraduate Research is **5 business days** prior to the deadline date on the stipend payroll schedule.
P14 (Adjunct Faculty)

Departments will need to review policy 4296 (http://www.policies.vt.edu/4296.pdf) for details on the proper use of a P14 appointment prior before beginning this procedure.

The Adjunct and Wage Faculty Payment Process (also called P14 payments) is typically used to compensate faculty members and classified employees, when hired as wage faculty, for professional services performed in support of instruction or research on a part-time, temporary basis. A stipend amount is paid on a per pay period basis over the course of the work or as a one-time payment, as appropriate. Wage faculty payments are only appropriate for the types of work that would qualify as exempt executive, administrative, or professional duties under the Fair Labor Standards Act (FLSA) and are not duties normally performed by classified employees.

Payment Type
Determine if the payment is an appropriate P14 payment. It is critical that the type of employment be reflected correctly. Departments are advised to work with their Human Resources employment consultant to ensure that they select the most appropriate payment method for the work performed. The following faculty services are appropriate for compensation through the P14 payment process:

- Payments to faculty and staff employees participating in non-credit instructional programs through the Continuing Education Division.

- Payments to adjunct teaching faculty members, including retired faculty and staff, on or off-campus, for teaching credit courses or providing other credit instruction, or overload payments to full-time instructional faculty who are teaching professional continuing education classes for credit through distance learning.

- Payments to current faculty and staff employees participating in university-sponsored consulting activities (Technical Assistance Program) coordinated through the Continuing Education division.

- Payments to part-time, temporary faculty members, including retired faculty, for administrative, instructional support, research, extension, or outreach activities.

- One-time payments such as payments to current Virginia Tech employees, which would otherwise be paid as an honorarium. (Payments for approved bonuses are entered by Human Resources.)

Please Note: P14 overload payments to existing faculty members require the approval of the Associate Provost for Faculty Affairs and should be routed to Human Resources for entry. Any P14 payment to an existing staff employee who is completing faculty level work must be approved by the Executive Director of Total Compensation and should be routed to Human Resources for entry.

Offer Letter
When departments decide to hire someone in a P14 position they will need to give the candidate a formal offer letter, P160 - Sample Letter for Part-Time Temporary Wage Faculty Appointment (P14). A copy of the offer letter must be kept as part of the employee file in the department.

Documentation of Credentials
Ensure that the employee has the appropriate documentation of credentials to be paid as a special faculty appointment. The Southern Association of Colleges and Schools accreditation process requires the University to employ adjuncts for teaching that have at least the minimal academic credentials required of all teaching faculty for the level they are teaching. Generally, the earned doctorate or terminal degree in the field is required. Instructors teaching lower division courses must hold at least a master's degree in the field. Under exceptional circumstances, professional experience for academic credentials may substitute but must be documented.
Credentials for teaching adjuncts are to be reviewed, certified, and retained by the department. See the Faculty Handbook, Section 2.5.2 for more detail.

Please Note: For teaching faculty departments must submit a completed Transcript Cover Sheet (http://provost.vt.edu/faculty_affairs/forms.html) and the official transcript to the Institutional Research and Effectiveness (Mail Code 0433). Departments should maintain a copy for their records.

In addition, wage faculty appointments to positions viewed as administrative and professional would similarly require an advanced degree or training and work experience at a level that equates to an advanced degree. See the Faculty Handbook, Section 3.0 for more detail.

Adjunct or wage faculty appointments for research faculty should follow the guidelines for academic credentials included in the definitions of those various titles as stated in the Faculty Handbook for Special Research Faculty, Section 2.1.

**Position Type**
Determine the correct employee class code to be entered during the PAF process.

To allow the University to correctly report the FTE* for the various P14 appointment types position numbers have been created which have unique employee class codes. When setting up your P14 appointment select the correct position type from the following employee class code descriptions assigned to position numbers set up for your department:

- **9A (Instructional PT Temp Adjunct)** Adjunct teaching for credit courses, and overload payments for full-time faculty teaching continuing education classes for credit through distance learning
- **9B (Non-Inst PT Temp Fac/Sum Research)** Part-time, temporary faculty for teaching non-credit courses, administrative, instructional support, research, extension, or outreach activities
- **9C (Continuing Educ PT Temp Faculty)** Non-credit instructional activities, entered by Continuing Education Division
- **9D (T/R Wages One Time Payments)** One-time payment for faculty activities

*P14 positions must be monitored so that filled positions are counted and reported to ensure that we remain in compliance with our Maximum Employment Level. Refer to Policy 3850, Management of Internal Position Allocations for more information.

**Calculating Payment**
It is best to use the salary payroll schedule to calculate the rate per pay period and determine the dates for the P14 appointment. For example if person is hired into a P14 appointment and will be receiving a total of $8000 for work that will be completed in 2 months then take $8000 and divide by 4 pay periods to get a rate of $2000 per pay period. When creating the job appointment PAF use the first day of a salary pay period (i.e. August 10) for the query date and the last day of a salary pay period (i.e. October 9) for the jobs effective end date so that the employee will receive the same amount per pay period.

If this is for a one-time payment enter the query date and jobs effective end date on the PAF for one salary pay period (Example: August 10 – August 24) and enter the total amount in the rate field.
P14 Appointments

Follow these steps to set up a P14 appointment after creating or updating the person's biographical record (PWAEBIO), looking up the position number (NBIPORG), verifying the current employment status and determining if the new employee has ever been employed in the position number (PW1EMPV). This process is called the PAF (Personnel Action Form).

Please Note: A conviction check needs to be completed before a P14 appointment can be entered. This is required by University Policy 4060.

Forms Needed (Maintain in your departmental files):
- Wage Employee Appointment Record (P12W)
- Part Time Faculty Appointment Authorization For Payment - P-14A
- P160 - Sample Letter for Part-Time Temporary Wage Faculty Appointment (P14) (Copy kept in file)

Payroll Steps
- Employee completes W4 and VA4 tax forms.
- Department and employee completes the Online I-9 (Employment Eligibility Verification).
- Department makes a copy of the employee's social security card.
- Department submits W4, VA4 and copy of social security card to the Payroll Office (Mail Code 0339).

The employee will also need to go to MyVT (http://my.vt.edu) to sign up for direct deposit.

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOEAEPF tab.

2. ID: If needed, type the person's ID number without any spaces or hyphens.

3. Query Date: Type the effective date of the appointment. Use the first day of a salary pay period to prevent prorating the first payment amount.

   Please Note: If this is for a one-time payment, enter the query date and jobs effective end date on the PAF for one salary pay period (Example: August 10 – August 24). If the dates span across multiple pay periods the employee will receive the indicated payment each pay period (ex. a one-time payment of $2,000 is entered with the query date of July 10 and end date of August 24, the employee would be paid $2,000 each pay period for 3 pay periods).

4. Approval Cat: Type or select from the list of values P14HIR (if the person does not have a current active job) or P14JOB (if the person does have a current active job).
5. **Approval Type**: P14HIR or P14JOB will default into this field.

6. **Position**: Type the P14 position number identified on NBIPORG. **Note**: If you do not type in a P14 position number, “Approval category invalid for position, empl class” will display.

7. **Suffix**: Type the appropriate suffix number. 00 (zeros) for the first time a person is assigned to a position, 01 for the second time, etc.

8. **New Value**: Click in the first empty field beneath New Value.

9. **Alternate Password**: Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.

10. **Employee Class Code**: For a P14HIR, type in the appropriate position type code (9A, 9B or 9D).

11. **Home Organization and Distribution Organization**: If you are setting up a P14HIR, these two fields will display. Type your 6-digit department number.

12. **Timesheet Orgn**: If you are setting up a P14JOB, this field will display. Type your 6-digit department number.

13. **Regular Rate**: Type the amount per pay period that the person should receive for 9A, 9B and 9C positions or the total amount for a one-time payment (9D).

14. **FTE**: Type the appropriate FTE amount based on the following directions. The FTE does not affect the regular rate. A value of 1 indicates this will be a full-time appointment during the time it is effective.

<table>
<thead>
<tr>
<th>Instructional (9A) positions</th>
<th>Non-Instructional (9B) Positions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Credit Hours</strong></td>
<td><strong>FTE</strong></td>
</tr>
<tr>
<td>1</td>
<td>.07</td>
</tr>
<tr>
<td>2</td>
<td>.13</td>
</tr>
<tr>
<td>3</td>
<td>.20</td>
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<td>4</td>
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<td>7</td>
<td>.47</td>
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<tr>
<td>8</td>
<td>.53</td>
</tr>
<tr>
<td>9</td>
<td>.60</td>
</tr>
<tr>
<td>10</td>
<td>.67</td>
</tr>
</tbody>
</table>
• **Continuing Educ (9C) positions**: (days teaching class X 6 hours)/384
• **One Time Payment (9D)**: No FTE calculation is needed. Type 0 (zero)

15. The remaining fields will auto-populate with the correct information.

16. Save the first step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

17. **Next Action**: From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to FUND. This is the second step of this PAF process.

18. **New Value**: Click in the first empty field beneath New Value.

19. A split screen of funding information will appear, normally with default information.

20. **COAS**: This field will display with a default of U (University).

21. **Index**: Indicates the funding number to be charged. Type over to change, if needed.

22. **Percent**: Indicates percent charged to the funding number. Type over to change, if needed. Add additional funding and percent numbers if split funding is desired. Position the cursor in the index field and arrow down for additional record rows.

23. Save the funding step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

24. **Next Action**: From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to JOBEND. This is the third step of this PAF process.

25. **New Value**: Click in the first empty field beneath New Value.
26. **Jobs Effective Date**: Type the P-14 appointment end date (do not enter the same date as the start date). Use the last day of a pay period to prevent prorating the last payment amount. **Please Note**: If this is for a one-time payment enter the query date and jobs effective end date on the PAF for one salary pay period (Example: August 10 – August 24). If the dates span across multiple pay periods the employee will receive the indicated payment each pay period (ex. a one-time payment of $2,000 is entered with the query date of July 10 and end date of August 24, the employee would be paid $2,000 each pay period for 3 pay periods).

27. **Job Status**: T (Terminated) displays as the default.

28. Save the job end step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

29. **Routing Information**: From the Options menu select Routing to go to the next step of the PAF.

30. **UserID**: In the APPR10 row enter the PID of your department approver. To search for a PID position the cursor in the UserID field and click on the down arrow button. In the PERSNL 90 row it will display PAYAPPLY.

31. Save the fourth step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

32. **Submit Transaction**: From the Options menu select Submit Transaction. Verify that the Transaction Status field has changed from Waiting to Pending.

33. **Notify**: Notify your department approver. The approval must take place prior to the salary payroll schedule deadline date for a timecard to be generated and the employee to be paid on time.
Summer Session Teaching Appointments

Please Note: Research summer appointments will be made via the P14 process using the position called Non-Inst PT Temp Fac/Sum Res that has an employee class code of 9B. Summer research can be spread over multiple pay periods via partial payments to enhance matching of pay with the pay period when effort was performed.

Enterers can use NBIPORG in Banner to look up summer session teaching position numbers for their department. The position numbers start with SSxxxx and there is a position for Summer VT Faculty Teaching (8A) and Summer Non-VT Faculty Teaching (8B). The PAF will need be routed to both the department approver and the dean’s office.

Follow these steps to create a summer session teaching appointment.

<table>
<thead>
<tr>
<th>Summer Session</th>
<th>Dates</th>
<th>Deadline</th>
<th>Pay Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Session I</td>
<td>May 10 – June 24</td>
<td>Salary pay period #12</td>
<td>July 1</td>
</tr>
<tr>
<td>Session II</td>
<td>June 25 – August 9</td>
<td>Salary pay period #15</td>
<td>August 16</td>
</tr>
</tbody>
</table>

Refer to the salary payroll schedule for the pay period deadline date to have the appointment entered and approved in Banner.

Follow these steps to set up a summer session appointment after creating or updating the person’s biographical record (PWAEBIO), verifying the current employment status and determining if the new employee has ever been employed in the position number (PWIEMPV). This process is called the PAF (Personnel Action Form).

Please Note: For summer non-VT faculty a conviction check needs to be completed before a summer session appointment can be entered. This is required by University Policy 4060.

Forms Needed (Maintain in your departmental files):
- Wage Employee Appointment Record (P12W) - Biographical section will need to be completed
- Summer Session Teaching Appointments Form or spreadsheet indicating appointments

Payroll Steps
- Employee completes W4 and VA4 tax forms.
- Department and employee completes the Online I-9 (Employment Eligibility Verification).
- Department makes a copy of the employee’s social security card.
- Department submits W4, VA4 and copy of social security card to the Payroll Office (Mail Code 0339).

The employee will also need to go to MyVT (http://my.vt.edu) to sign up for direct deposit.

1. Navigate to PWIEMPV form, type the person’s ID number then click in a field to populate the form. Next click on the NOAEPAF tab.
2. **ID**: If needed, type the person's ID number without any spaces or hyphens.

3. **Query Date**: Type the effective date for the summer session. Please Note: Use 5/10 for Summer I or 6/25 for Summer II summer session payment. Banner will not accept any other date as the query date.

4. **Approval Cat**: Type or select from the list of values SSHIRE (if the person does not have a current active job) or SSJOB (if the person does have a current active job).

5. **Approval Type**: SSHIRE or SSJOB will default into this field.

6. **Position**: Type the summer session position number identified on NBIPORG. There are 2 position types (VT Teaching and Non-VT Teaching). If you do not type in a summer session position number, “Approval category invalid for position, empl class” will display.

7. **Suffix**: Type the appropriate suffix number. 00 (zeros) for the first time a person is assigned to a position, 01 for the second time, etc.

8. **New Value**: Click in the first empty field below the arrow button beneath New Value.

9. **Alternate Password**: Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.

10. **Employee Class Code**: If you are setting up a SSHIRE for a non-VT employee, you may need to type the appropriate class code. If you are setting up an SSJOB this field will not display.

    **8B (Summer Session Non-VT Faculty Teaching)**

11. **Home Organization, Distribution Organization, or Timesheet Organization**: Type your 6-digit department number.

12. **Job Effective Date**: This field displays a default value based on the query date.

13. **Regular Rate**: Type the amount of pay for the entire summer session with no dollar sign.

14. **FTE**: Type the appropriate FTE amount. You can only enter up to 3 places to the right of the decimal point.
FTE for VT (8A) and Non-VT (8B) Summer Teaching Appointments
Please use the chart below based upon number of credits being taught.

<table>
<thead>
<tr>
<th># of Credits</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>.07</td>
</tr>
<tr>
<td>2</td>
<td>.13</td>
</tr>
<tr>
<td>3</td>
<td>.20</td>
</tr>
<tr>
<td>4</td>
<td>.27</td>
</tr>
<tr>
<td>5</td>
<td>.33</td>
</tr>
<tr>
<td>6</td>
<td>.40</td>
</tr>
</tbody>
</table>

15. The remaining fields will auto-populate with the correct information.

16. Save the first step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

17. Next Action: From the Options menu select Next Action to go to the next step of the PAF. The Approval Type changed to FUND. This is the second step of this PAF process.

18. New Value: Click in the first empty field beneath New Value.

19. A split screen of funding information will appear, normally with default information.

20. COA: This field will display with a default of U (University).

21. Index: Indicates the funding number to be charged. Type over to change, if needed.

22. Percent: Indicates percent charged to the funding number. Type over to change, if needed. Add additional funding and percent numbers if split funding is desired. Position the cursor in the index field and arrow down for additional record rows.

23. Save the funding step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.
24. **Next Action:** From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to JOBEND. This is the third step of the PAF process.

25. **New Value:** Click in the first empty field beneath New Value.

26. **Jobs Effective Date:** This field will default the end date of the summer school session. This date cannot be changed on the screen.

27. **Job Status:** T (Terminated) displays as the default.

28. This step was saved automatically when you activated the screen. If you press save the hint line should display “No changes to save”.

29. **Routing Information:** From the Options menu select Routing to go to the next step of the PAF.

30. **UserID:** In the APPR10 row enter the PID of your department approver. In the APPR20 row enter the PID of the dean approver. To search for a PID position the cursor in the UserID field and click on the arrow button. In the PERSNL 90 if needed type PAYAPPLY.

31. Save the Routing Information. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

32. **Submit Transaction:** From the Options menu select Submit Transaction. **Verify that the Transaction Status field has changed from Waiting to Pending.**
33. **Notify:** Notify your department approver and the dean's office approver. The department approver must approve the PAF first before the dean's office can approve it. The approval must take place prior to the salary payroll schedule deadline date so that the PAF is applied to Banner.
Status Changes (Change Rate of Pay)

Wage/P14/GA/Graduate Fellowships Status Change
Follow these steps to change the status of an appointment. This process also allows for funding changes as long as they are effective on the same date as the status change.

Forms Needed (Maintain in your departmental files):
- Obtain the proper paperwork giving permission to change the rate of pay and/or title. For wage employees, the employment section in Wage Employee Appointment Record (P12W) form must be filled out again indicating the changes.

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOAEPAF tab.

2. **ID:** If needed, type the person's ID number without any spaces or hyphens.

3. **Query Date:** Type the effective date of the status change.

4. **Approval Cat:** Type or select from the list of values the status change code that corresponds to the appointment type.

   - **STSTAT** - Student Wage Appointment
   - **WASTAT** - Non-Student Wage Appointment
   - **EMSTAT** - Emergency Hire Appointment
   - **GASTAT** - Graduate Appointment
   - **P14STA** - P14 Appointment
   - **STPSTA** - Graduate Fellowship Appointment

5. **Approval Type:** The approval category type code will default into this field.

6. **Position:** Type the position number for the appointment identified on PWIEMPV.

7. **Suffix:** Type the suffix number for the appointment identified on PWIEMPV.
8. **New Value:** Click in the first empty field beneath New Value.

9. **Alternate Password:** Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.

![Image of a form with fields for New Value, Alternate Password, Regular Rate, FTE, Title, and a split screen of funding information.](image)

10. **Regular Rate:** Type the new rate of pay.

11. **FTE:** Type the new FTE. Note: This field will only display for graduate, P-14 and stipend appointments.

12. **Title:** Type the new title. Note: This field will only display for non-student wage, emergency hire and student appointments.

13. Any remaining fields will display default values.

14. Save the first step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

15. **Next Action:** From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to CHGFND. This is the second step of this PAF process.

16. **New Value:** Click in the first empty field beneath New Value.

17. A split screen of funding information will appear with current funding information. If needed make the change in the New Job Labor Distribution section.
18. **COAS:** This field will display with a default of U (University).

19. **Index:** Indicates the fund number to be charged. Type over to change, if needed.

20. **Percent:** Indicates percent charged to the funding number. Type over to change, if needed. Add additional funding and percent numbers if split funding is desired. Position the cursor in the index field and arrow down for additional record rows.

21. Save the funding step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

22. **Routing Information:** From the Options menu select Routing to go to the next step of the PAF.

23. **UserID:** In the APPR10 row enter the PID of your department approver. To search for a PID position the cursor in the UserID field and click on the down arrow button. In the PERSNL 90 row it will display PAYAPPLY.

24. Save the routing step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

25. **Submit Transaction:** From the Options menu select Submit Transaction. Verify that the Transaction Status field has changed from Waiting to Pending.

26. **Notify:** Notify your department approver. The approval must take place prior to the salary or wage payroll schedule deadline date for a correct timecard or payment to be generated for the employee.
**Undergraduate Fellowships Status Change**

Follow these steps to change the rate of a pay for an undergraduate fellowship.

**Forms Needed** (Maintain in your departmental files in accordance with the retention schedule established by Records Management):

- Obtain the proper paperwork giving permission to change the rate of pay.

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOAEPAF tab.

2. **ID**: If needed, type the person's ID number without any spaces or hyphens.

3. **Query Date**: Type the effective date of the status change.

4. **Approval Cat**: Type or select UGFSTA (Undergraduate Fellowship) from the list of values the status change code that corresponds to the appointment type.

5. **Approval Type**: The approval category type code will default into this field.

6. **Position**: Type the position number for the appointment identified on PWIEMPV.

7. **Suffix**: Type the suffix number for the appointment identified on PWIEMPV.

8. **New Value**: Click in the first empty field beneath New Value.

9. **Alternate Password**: Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.
10. **Regular Rate:** Type the new rate of pay.

11. Any remaining fields will display default values.

12. Save the first step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

13. **Comments:** Additional information is needed so that the status change can be completed. Select Other Information and Comments tab and use the text box to enter justification for the status change and Undergraduate Research will review these comments. This is the second step of the PAF process.

14. Save the transaction comments. From the Options menu select Transaction to go back to the transaction screen.

15. **Routing Information:** From the Options menu select Routing to go to the next step of the PAF.

16. **UserID:** In the APPR10 row enter the PID of your department approver. To search for a PID position the cursor in the UserID field and click on the down arrow button. If needed, in the APPR60 row enter UGRESAPPR, this will route the PAF to Undergraduate of Reasearch for their approval. If needed, in the PERSNL 90 row enter PAYAPPLY.
17. Save the routing step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

18. **Submit Transaction**: From the Options menu select Submit Transaction. Verify that the Transaction Status field has changed from Waiting to Pending.

19. **Notify**: Notify your department approver. The approval must take place prior to the stipend payroll schedule deadline date for a correct payment to be generated. Please be aware that the deadline to have the PAF submitted to Undergraduate Research is **5 business days** prior to the deadline date on the stipend payroll schedule.
**Summer Session Status Change**

Follow these steps to change the status of a summer session appointment. This process also allows for funding changes as long as they are effective on the same date as the status change.

**Forms Needed** (Maintain in your departmental files in accordance with the retention schedule established by Records Management):

- Obtain the proper paperwork giving permission to change the rate of pay.

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOAEPAF tab.

![Oracle screenshot](image)

2. **ID:** If needed, type the person’s ID number without any spaces or hyphens.

3. **Query Date:** Type the effective date of the summer session appointment. For example you will type 5/10 if that is the begin date of the summer session appointment. You will not be allowed to type any other date.

4. **Approval Cat:** Type or select from the list of values SSSTAT (Summer School Status Change).

5. **Approval Type:** SSSTAT will default into this field.

6. **Position:** Type the position number for the summer session appointment identified on PWIEMPV.

7. **Suffix:** Type the suffix number for the summer session appointment identified on PWIEMPV.

8. **New Value:** Click in the first empty field beneath New Value.

9. **Alternate Password:** Position the cursor in the User ID field, tab into the password field and type in your **Banner password**. Either click on the Verify button or press the Enter key twice.
10. **Regular Rate:** Type the new rate of pay.

11. **FTE:** Type the new FTE.

12. Any remaining fields will display default values.

13. Save the first step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

14. **Next Action:** From the Options menu select Next Action to go to the next step of the PAF. The Approval Type field changed to CHGFND. This is the second step of this PAF process.

15. **New Value:** Click in the first empty field beneath New Value.

16. A split screen of funding information will appear with current funding information. If needed make the change in the New Job Labor Distribution section.

17. **COA:** This field will display with a default of U (University).

18. **Index:** Indicates the fund index number to be charged. Type over to change, if needed.
19. **Percent:** Indicates percent charged to the funding number. Type over to change, if needed. Add additional funding and percent numbers if split funding is desired. Position the cursor in the index field and arrow down for additional record rows.

20. Save the funding step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

21. **Routing Information:** From the Options menu select Routing to go to the next step of the PAF.

22. **UserID:** In the APPR10 row enter the PID of your department approver. In the APPR20 row enter the PID of the dean approver. To search for a PID position the cursor in the UserID field and click on the arrow button. If needed, in the PERSNL 90 row enter PAYAPPLY.

23. Save the routing step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

24. **Submit Transaction:** From the Options menu select Submit Transaction. Verify that the Transaction Status field has changed from Waiting to Pending.

25. Notify your department approver and the dean's office approver. The department approver must approve the PAF first before the dean's office can approve it. The approval must take place prior to the summer session payroll schedule deadline date so that the PAF is applied to Banner.
Funding Changes

Staff/Faculty/Wage/P14/GA/Fellowships Funding Change
Follow these steps to change the funding of a salary or wage appointment.

For retroactive funding changes complete a funding change PAF for the current and future pay periods then proceed to the job labor redistribution system (located in HokieSPA and supported by the Payroll Office) to submit the changes.

If you do not have access to change funding for an appointment the Change or Extend Funding (P10) form can sent to Human Resources (0318). For retroactive please send the P10 form to the Payroll Office (0339).

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOAEPAF tab.

2. ID: If needed, type the person's ID number without any spaces or hyphens.

3. Query Date: Type the effective date of the funding change.

4. Approval Cat: Type or select CHGFND from the list of values.

5. Approval Type: FUND will default into this field.

6. Position: Type the position number for the appointment identified on PWIEMPV.

7. Suffix: Type the suffix number for the appointment identified on PWIEMPV.

8. New Value: Click in the first empty field beneath New Value.

9. Alternate Password: Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.
10. A split screen of funding information will appear with current funding information.

11. COAS: This field will display with a default of U (University).

12. Index: Indicates the fund index number to be charged. Make the change in the New Job Labor Distribution section by typing over the number.

13. Percent: Indicates percent charged to the funding number. Type over to change, if needed. Add additional funding and percent numbers if split funding is desired. Position the cursor in the index field and arrow down for additional record rows.

14. Save the funding change step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom the screen.

15. Routing Information: From the Options menu select Routing to go to the next step of the PAF.

16. UserID: In the APPR10 row enter the PID of your department approver. To search for a PID position the cursor in the UserID field and click on the down arrow button. If needed, in the PERSNL 90 row enter PAYAPPLY.

17. Save the routing step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

18. Submit Transaction: From the Options menu select Submit Transaction. Verify that the Transaction Status field has changed from Waiting to Pending.
19. Notify: Notify your department approver. The approval must take place prior to the salary or wage payroll schedule deadline date for a correct timecard to be generated for the employee.
Summer Session Funding Change
Follow these steps to change the funding of a summer session appointment. If you do not have access to change funding the Change or Extend Funding (P10) form can be completed and sent to Human Resources (0318).

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOAEPAF tab.

2. ID: If needed, type the person's ID number without any spaces or hyphens.

3. Query Date: Type the effective date of the funding change.

4. Approval Cat: Type or select SSFUND from the list of values.

5. Approval Type: FUND will default into this field.

6. Position: Type the position number for the summer session appointment identified on PWIEMPV.

7. Suffix: Type the suffix number for the summer session appointment identified on PWIEMPV.

8. New Value: Click in the first empty field beneath New Value.

9. Alternate Password: Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.

10. A split screen of funding information will appear with current funding information.

11. COA: This field will display with a default of U (University).
12. **Index**: Indicates the fund index number to be charged. Make the change in the New Job Labor Distribution section by typing over the number.

13. **Percent**: Indicates percent charged to the funding number. Type over to change, if needed. Add additional funding and percent numbers if split funding is desired. Position the cursor in the index field and arrow down for additional record rows.

14. Save the funding change step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom the screen.

15. **Routing Information**: From the Options menu select Routing to go to the next step of the PAF.

16. **UserID**: In the APPR10 row enter the PID of your department approver. In the APPR20 row enter the PID of the dean approver. To search for a PID position the cursor in the UserID field and click on the arrow button. If needed, in the PERSNL 90 row enter PAYAPPLY.

17. Save the routing step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

18. **Submit Transaction**: From the Options menu select Submit Transaction. Verify that the Transaction Status field has changed from Waiting to Pending.

19. Notify your department approver and the dean's office approver. The department approver must approve the PAF first before the dean's office can approve it. The approval must take place prior to the summer session payroll schedule deadline date so that the PAF is applied to Banner.
Terminating Appointments

Wage/GA/P14/Fellowships Termination
Follow these steps to terminate a wage, GA, P14, graduate or undergraduate fellowship appointment.

Please Note: Emergency Hire/GA/P14/Fellowship appointments already have an end date on the job but if the position is terminated before the original end date then a job end PAF will need to be entered to reflect the correct date.

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOAEPAF tab.

2. **ID:** If needed, type the person's ID number without any spaces or hyphens.

3. **Query Date:** Type the effective date that the job will end.

4. **Approval Cat:** Type or select JOBEND from the list of values.

5. **Approval Type:** JOBEND will default into this field.

6. **Position:** Type the position number for the appointment identified on PWIEMPV.

7. **Suffix:** Type the suffix number for the appointment identified on PWIEMPV.

8. **New Value:** Click in the first empty field beneath New Value.

9. **Alternate Password:** Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.
10. **Jobs Effective Date:** Type the effective date the job will end.

11. Save the job end step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

12. **Routing Information:** From the Options menu select Routing to go to the next step of the PAF.

13. **UserID:** In the APPR10 row, enter the PID of your department approver. To search for a PID position the cursor in the UserID field and click on the down arrow button. In the PERSNL 90 row it will display PAYAPPLY.

14. Save the routing step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

15. **Submit Transaction:** From the Options menu select Submit Transaction. Verify that the Transaction Status field has changed from Waiting to Pending.

16. **Notify:** Notify your department approver. The approval must take place prior to the payroll schedule deadline date.
Staff/Faculty Termination
Follow these steps to terminate a salary staff or faculty appointment.

Please Note: Retirements and Long Term Disability (LTD) will be processed by Human Resources.

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOAEPAF tab.

2. **ID:** If needed, type the person's ID number without any spaces or hyphens.

3. **Query Date:** Type the effective date that the job will end. **Please Note:** If this is for a separation that has occurred in a past pay period enter the last day of the last salary pay period (either 9th or 24th).

4. **Approval Cat:** Type or select SALEND from the list of values.

5. **Approval Type:** SALEND will default into this field.

6. **Position:** Type the position number for the appointment identified on PWIEMPV.

7. **Suffix:** Type the suffix number for the appointment identified on PWIEMPV.

8. **New Value:** Click in the first empty field below the arrow button beneath New Value.

9. **Alternate Password:** Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.
10. **Personnel Date:** Type the date of the employee's last day of employment.

11. **Job Change Reason:** Type the appropriate separation code using the following chart.

<table>
<thead>
<tr>
<th>Employee Reasons</th>
<th>Staff Terminations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better Job</td>
<td>Completion of Restricted Appt (SEP)</td>
</tr>
<tr>
<td>Resigned During Probationary Period</td>
<td>Separation/Layoff (SEPL)</td>
</tr>
<tr>
<td>Leaving Area</td>
<td>Unsatisfactory Performance During Probationary Period (SEPP)</td>
</tr>
<tr>
<td>Family Responsibilities</td>
<td>Disciplinary Action (SEP)</td>
</tr>
<tr>
<td>Education</td>
<td>Expiration of Conditional Leave (SEP)</td>
</tr>
<tr>
<td>Personal Reasons</td>
<td>Expiration of Visa (SEP)</td>
</tr>
<tr>
<td>Ill Health</td>
<td></td>
</tr>
<tr>
<td>Death</td>
<td></td>
</tr>
<tr>
<td>Dissatisfied (Explain in Transaction Comments)</td>
<td></td>
</tr>
<tr>
<td>Military</td>
<td></td>
</tr>
<tr>
<td>Other (Explain in Transaction Comments)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Transfer</th>
<th>Faculty Terminations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classified to Faculty</td>
<td>Completion of Restricted Appt (SEP)</td>
</tr>
<tr>
<td>Faculty to Classified</td>
<td>Did Not Receive Tenure (SEP)</td>
</tr>
<tr>
<td>Transfer to other VT Dept</td>
<td>Non-Reappointment (SEP)</td>
</tr>
<tr>
<td>Transfer to other Virginia State Agency</td>
<td>Termination for Cause (Explain in Transaction Comments) (SEP)</td>
</tr>
<tr>
<td></td>
<td>Expiration of Visa (SEP)</td>
</tr>
</tbody>
</table>

12. Save the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

13. **Comments:** Additional information is needed so that the separation can be completed. Select Other Information and Comments tab and use the text box to enter any other information relating to the separation.

Here is a list of questions that may need to be answered in the transaction comments field:

- Was the separation time not at the end of normal work day? If not, please type a note of when the employee left.
- Is the employee eligible for rehire?
- Is the separation due to a transfer? If so, please type the new department name/number or agency name.

**For Academic Year (AY) employees**
- If the person is an academic year (AY) employee do they want the insurance to end in May or August? If the employee does not want the insurance to end until August then please do not terminate them until August.
14. Save the transaction comments. From the Options menu select Transaction to go back to the transaction screen.

15. **Routing Information**: From the Options menu select Routing to go to the next step of the PAF.

16. **UserID**: In the APPR10 row enter the PID of your department approver. To search for a PID position the cursor in the UserID field and click on the arrow button. If needed, in the PERSNL 90 row enter PAYAPPLY.

17. Save the routing information. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

18. **Submit Transaction**: From the Options menu select Submit Transaction. Verify that the Transaction Status field has changed from Waiting to Pending.

19. **Notify**: Notify your department approver. The approval must take place prior to the salary payroll schedule deadline date. If the deadline to submit a separation was missed, please immediately notify your departmental approver and include Cara Epperly for faculty transactions or Brandi Webb for staff transactions.

20. After the PAF has been approved and applied the person who entered the PAF will receive an email confirmation that contains information on the separation.

21. If you have the original resignation letter please send it to Human Resources (0318).
Summer Session Termination
Follow these steps to terminate a summer session appointment. You only need to create a job end PAF if the position needs to be terminated before the end of the summer session.

1. Navigate to PWIEMPV form, type the person's ID number then click in a field to populate the form. Next click on the NOAEPAF tab.

2. If needed, type the person's ID number without any spaces or hyphens.

3. **Query Date**: Type the effective date that the summer session appointment will end.

4. **Approval Cat**: Type or select SSEND from the list of values.

5. **Approval Type**: SSEND will default into this field.

6. **Position**: Type the position number for the summer session appointment identified on PWIEMPV.

7. **Suffix**: Type the suffix number for the summer session appointment identified on PWIEMPV.

8. **New Value**: Click in the first empty field beneath New Value.

9. **Alternate Password**: Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.

10. **Personnel Date**: Type the effective date the job will end.
11. Save the job end step. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

12. **Routing Information:** From the Options menu select Routing to go to the next step of the PAF.

13. **UserID:** In the APPR10 row enter the PID of your department approver. In the APPR20 row enter the PID of the dean approver. To search for a PID position the cursor in the UserID field and click on the arrow button. If needed, in the PERSNL 90 row enter PAYAPPLY.

14. Save the routing step of the PAF. The hint line should display “Transaction Complete: Records applied and saved” at the bottom of the screen.

15. **Submit Transaction:** From the Options menu select Submit Transaction. Verify that the Transaction Status field has changed from Waiting to Pending.

16. Notify your department approver and the dean’s office approver. The department approver must approve the PAF first before the dean’s office can approve it. The approval must take place prior to the summer session payroll schedule deadline date so that the PAF is applied to Banner.
PAF Transactions

Transaction status reflects the status of the PAF transaction as a whole.

- When an enterer creates a PAF the transaction status is set to Waiting. Corrections or deleting PAFs can be made while it is in this status.
- Once the enterer submits a PAF to an approver the transaction status becomes Pending. If a correction needs to be made to a PAF either the enterer can void it to start over or the approver needs to perform a Return/Correction on the PAF back to the enterer.
- Once all approvers have taken action the transaction status becomes Approved. PAFs can no longer be corrected or voided by the enterer.
- Once the PAF has been applied to the database the transaction status becomes Completed. If a correction needs to be made to the PAF, the enterer will need to contact the HR Service Center (540-231-9331 or hrservicecenter@vt.edu).

Check the status of PAF
Follow these steps to check the status of a PAF.

1. Navigate to NOAEPAF form.
2. ID: Type the ID of the person.
3. Trans No: Position your cursor in the Trans Number field and click on the down arrow button beside it. A pop up box will appear with a list of transactions. The most current transaction will be the last one listed.
4. Transaction Status: Look at the status to determine where the PAF is in the processing phase.
   - Waiting – PAF has not been submitted
   - Pending – PAF has been submitted but has not been approved yet
   - Approved – PAF has been approved
   - Completed – PAF has been completed and applied to Banner
Voiding PAFs
Follow these steps to void a PAF that has not been approved yet. PAFs can only be voided if it has a status of Waiting, Pending or Return/Correction.

1. Navigate to the NOAAPSM form.

2. **Transaction Status:** Change the transaction status to Waiting, Pending or Return/Correction.

3. **Queue Status:** Change the queue status to None (Originator).

4. **ID:** Position the cursor in the first empty row below ID.

5. **Alternate Password:** Position the cursor in the User ID field, tab into the password field and type in your Banner password. Either click on the Verify button or press the Enter key twice.

6. All the PAFs that you have either created and have not submitted (Waiting); PAFs that have submitted to an approver but have not yet been acted on (Pending); or PAFs that have been returned by your approver (Return/Correction) will display at the bottom of the screen. You can view the system generated transaction number by scrolling to the right (using the scroll bar below the description column).

7. **Transaction Detail Information:** Position the cursor in the ID field to highlight the PAF and click on the Transaction Detail tab view the detail information that was entered during the PAF process.

**Note:** You cannot change information on this screen - it is a read only view.
8. **Transaction Information:** Click on Transaction Information tab to return to the NOAAPSM form.

9. **Void a PAF:** Position the cursor in the ID field to highlight the PAF you wish to void.

10. **Approver Action:** Click on the arrow to the right of the approver action to activate the drop down menu and select Void.

11. Save the void action. The hint line should display “Transaction complete - records posted and committed” at the bottom of the screen.
Correcting PAFs
Follow these steps to correct a PAF. PAFs can only be corrected if it has a status of *Waiting* or *Return/Correction*.

1. Navigate to NOAEPAF form.

2. **ID**: Type the ID of the person.

3. **Trans No**: Position your cursor in the Trans Number field and click on the down arrow button beside it. A pop up box will appear with a list of transactions. The most current transaction will be the last one listed. Highlight the PAF and click on OK.

4. **New Value**: Click in the first empty field beneath New Value.

5. **Alternate Password**: Position the cursor in the User ID field, tab into the password field and type in your *Banner password*. Either click on the Verify button or press the Enter key twice.

6. **To correct a PAF**: Go through the PAF to make your correction then resubmit the PAF to your approver.

7. Notify your department approver. **Please Note:** If a mistake is made on the query date, approval category, position number or suffix you will need to void the PAF and start over.
**Timecards**

There are 3 payroll types that are processed each pay period - WA (Wage), SA (Salary) and ST (Fellowship). The standard work week runs from Friday midnight to the following Friday at midnight. Please refer to Policy 4298 in regards to Wage Employee Time Worked Records.

**TimeClock Plus**

The Payroll office has implemented the TimeClock Plus system as a way to electronically record hours worked. Wage employees will clock in and out either on a terminal or through the WebClock. At the end of each pay period the approved hours worked will automatically be uploaded to the timecards (PHAHOUR) in Banner. Departments should run the Timecard Entry Verification Report in the HRIS web reporting system to ensure that the hours were uploaded correctly. Enterers do have the option to manually enter hours on the timecard if needed.

For a new wage employee to be able to start using TimeClock Plus a PAF for their job appointment must be entered, approved and applied in Banner. On the PAF there is a field labeled Time Clock Job Code that needs to be entered to be able to import the job into the TimeClock Plus system.

For TimeClock support and training please send an email to timeclock@vt.edu.

**Earn Codes**

Listed below are the most commonly used timecard earn codes.

<table>
<thead>
<tr>
<th>Non-Student/ Emergency Hire</th>
<th>REG – Regular hours</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>REH – Retroactive hours</td>
</tr>
<tr>
<td></td>
<td>HSR – Hourly special rate</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Student/Work Study</th>
<th>WHT – Regular hours - withhold FICA taxes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>WNT – Regular hours - withhold no FICA taxes</td>
</tr>
<tr>
<td></td>
<td>REH – Retroactive hours - withhold FICA taxes</td>
</tr>
<tr>
<td></td>
<td>RES – Retroactive hours - withhold no FICA taxes</td>
</tr>
<tr>
<td></td>
<td>HSR – Special rate - withhold FICA taxes</td>
</tr>
<tr>
<td></td>
<td>SRA – Special rate - withhold no FICA taxes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Staff Overtime/ Adjustments</th>
<th>OTH – Overtime hours - non-exempt staff</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>OTP – Overtime hours - exempt staff (straight overtime pay)</td>
</tr>
<tr>
<td></td>
<td>CAL – On-call pay</td>
</tr>
<tr>
<td></td>
<td>PTH – Part time salaried hours (over normal schedule)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Graduate/P14/ Fellowship Adjustments</th>
<th>RGT – Retroactive GA payment- withhold FICA taxes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>RTG – Retroactive GA payment - withhold no FICA taxes</td>
</tr>
<tr>
<td></td>
<td>CPA – P14 retroactive payment</td>
</tr>
<tr>
<td></td>
<td>RST – Retroactive fellowship payment (entry to be made on ST payroll)</td>
</tr>
</tbody>
</table>
Time Sheet Dispositions

The disposition (Disp) field in the History Jobs block of PHAHOUR indicates that status of the time sheet. These are the three disposition codes that you might notice on PHAHOUR entry dates:

- A disposition of 05 means that the record was kicked out during the processing of payroll. More than likely the employee is a new employee and not all of the benefits deduction entries have been entered. You will not be able to enter hours and will need to wait until the timecard is changed back to a disposition of 10.
- A disposition of 10 means that the time sheet is ready for hours to be entered.
- A disposition of 20 means that the hours have been entered and the time sheet is ready for the next step of processing.
Non-Student/Emergency Hire Timecards
Follow these steps to enter hours for non-student wage and emergency hire employees. Hours must be entered on the time card entry dates that are listed on the wage payroll schedule.

1. If needed, obtain a completed timecard signed by both the employee and the supervisor. The supervisor must sign the record to verify the number of hours worked and approve the resulting pay. Maintain this form in your departmental files in accordance with the retention schedule established by Records Management.

2. Navigate to the PHAHOUR form.

3. **Year:** Type the year.

4. **Payroll ID:** Type WA (Wage).

5. **Payroll Number:** Type the current pay number.

6. **Enter Selection Criteria:** Either select tab on the keyboard or click Enter Selection Criteria from the Options menu.

7. **Orgn:** Type the 6-digit department number if you wish to retrieve all department timecards. OR
   **ID:** Type an employee’s ID if you wish to retrieve only the timecards for that one employee.

8. **OK:** Click the Ok button to retrieve the timecards you selected. If you selected an entire department or an employee with multiple timecards place your cursor in the ID field and use the arrow up and down keys on the keyboard to navigate between the timecards.

9. Verify that you are on the timecard for which you use to enter hours.
   - Check the Posn field to verify the position and suffix number.

10. In the History Earnings block position your cursor in the first empty row below the Earnings field.
11. **Earnings**: Type REG to enter hours worked for the current pay period.

12. **Hours or Units**: Type the total number of hours worked for the current pay period.

13. Type the number of hours worked per work week in the appropriate work week column. The work week columns are the last three columns on the right in the History Earnings block. The number of hours entered in these columns should equal the number of hours entered in the Hours or Units field.

14. Save the time entry. The hint line displays transaction complete, record applied and saved at the bottom of the screen. Funding information should now display in the Time Distribution block.

15. **Index**: If you need to change the default funding click in the index column on the first row of funding to enable the Time Distribution block. Highlight and type over the funding number if it needs to be changed. A row of funding can also be deleted by selecting Record - Clear from the menu bar. Use the arrow down key on the keyboard if you need to add additional funding rows.

16. **Percent**: Highlight and type over the percent if a change is necessary. The total percent field at the bottom must equal 100 when you are finished entering the funding information.

17. **Hours**: Highlight and type over the hours if a change is necessary. The total hours field at the bottom must equal the number of hours entered in the Hours or Units field when you are finished entering the funding information.

18. Save the funding changes. The hint line displays transaction complete, record applied and saved at the bottom of the screen.

19. **Correct Labor Distribution Dollars**: If the total percent and hours fields are not rounding correctly, the hint line will display “*Error* Labor Dist Must Equal 100% and Earnings Hours Must Equal (Hours)”.


20. If needed, position your cursor in the ID field and use the arrow up and down keys on the keyboard to navigate to additional timecards. When all timecards for your department have been entered, run the Time Card Entry Verification web report to double check your entries.

**Verify Hours Entered:**
Go to [http://www.computing.vt.edu/content/banner-reporting-tools-0](http://www.computing.vt.edu/content/banner-reporting-tools-0), select the Human Resources Reporting System and enter your Banner username and password to access the web report. Select the Timecard Entry Verification report underneath the Verification folder.

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>FClass</th>
<th>Position</th>
<th>Shift</th>
<th>Earn</th>
<th>Tot_Hrs</th>
<th>Rate</th>
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<th>NOV-19</th>
<th>NOV-26</th>
<th>NOV-30</th>
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</thead>
<tbody>
<tr>
<td>Cat, Timothy</td>
<td>PBT-00-0001</td>
<td>Non-Student Wage</td>
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<td>$12.00</td>
<td>15</td>
<td>16</td>
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</tr>
</tbody>
</table>

**Retroactive Hours**
If applicable, you can also use this form to enter retroactive hours (i.e., hours worked in a previous pay period that were not entered on the previous pay period's timecard - this might happen because an employee forgot to sign and turn in their time record) and adjustments (e.g., if an employee was paid at a lower rate of pay than they should have received on a previous timecard - this might happen because a status change PAF is completed after the PAF deadline date).

1. In the History Earnings block position your cursor in the next empty row in the Earnings field below the REG line you just entered.

2. **Earnings:** Type REH to enter retroactive hours.
3. **Hours or Units**: Type the total number of hours worked for which back pay is due.

4. Type the total number of hours worked in the first work week column. You do not need to split out the hours by the dates. The number of hours entered in this column should equal the number of hours entered in the Hours or Units field.

5. Save the time entry. The hint line displays transaction complete, record applied and saved.

6. Funding information should now display and can be changed if needed.

7. Indicate on the hard copy time record what payroll the retroactive hours were entered on.

**Adjustment Hours**

1. In the History Earnings block position your cursor in the next empty row in the Earnings field below the REG line you just entered.

2. **Earnings**: Type HSR to enter an adjustment.

3. **Hr/Unit**: Type the total number of hours for which an adjustment is needed.

4. **Sp Rate**: Type the amount per hour that the employee missed.

   Ex. Timothy Cat was given a raise from $10 to $12 effective the first day of pay period 1 but the status change PAF was not completed until after the deadline date. Timothy’s rate on the time card for pay period 1 displayed $10 and he was paid for 30 hours at $10 (30 REG).

   In pay period 2 you can pay Timothy for the $2 x 30 for which he is owed by entering 30 hours at $2 special rate (30 HSR). See picture above.

5. **Amount**: Leave this field blank - it will default in when you save this entry.

6. Type the total number of hours again in the first work week column. You do not need to split out the hours by the dates. The number of hours entered in this column should equal the number of hours entered in the Hours or Units field.
7. Save the time entry. Funding information should now display and can be changed just as with the REG entry funding.

8. Indicate on the hard copy time record what payroll the adjusted hours were entered on.

Reconciliation

- The person who enters hours should always run the Time Card Entry Verification web report to double check their entries.

- In addition, the Payroll Office will send each department a Wage Payroll Reconciliation Report.

- The person responsible for reconciliation will compare the time sheets to the Wage Payroll Reconciliation Report. This individual cannot be the employee or the data entry person and preferable not the supervisor.

- The person responsible for reconciliation checks for errors then signs, dates, and files the report. The report must be kept for four years. If the person responsible finds errors they should talk with the Payroll Office to resolve the discrepancy.
Student/Work Study Timecards
Follow these steps to enter hours for student (regular and work study) wage employees. Hours must be entered on the time card entry dates that are listed on the Wage Payroll Schedule.

1. If needed, obtain a completed timecard signed by both the student and the supervisor. The supervisor must sign the record to verify the number of hours worked and approve the resulting pay. Maintain this form in your departmental files in accordance with the retention schedule established by Records Management.

2. Navigate to the PHAHour form.

3. **Year:** Type the year.

4. **Payroll ID:** Type WA (Wage).

5. **Payroll Number:** Type the current pay number.

6. **Enter Selection Criteria:** Either select tab on the keyboard or click Enter Selection Criteria in the Options menu.

7. **Orgn:** Type the 6-digit department number if you wish to retrieve all department timecards.
   OR
   **ID:** Type a student's ID if you wish to retrieve only the timecards for that one student.

8. **OK:** Click the Ok button to retrieve the timecards you selected. If you selected an entire department or an employee with multiple timecards place your cursor in the ID field and use the arrow up and down keys on the keyboard to navigate between the timecards.

9. Verify that you are on the timecard for which you use to enter hours.
   - Check the Posn field to verify the position and suffix number.
10. In the History Earnings block position your cursor in the first empty row below the Earnings field.

11. **Code:** Type either WNT or WHT to enter hours worked for the current pay period.

   **WNT** (Wage No FICA Tax) is used if the student is enrolled at least half time. (6 hours for undergraduate students, 3 hours for summer school students).

   **WHT** (Wage Withhold FICA Tax) is used if the student has dropped below half time.

   If you type a code that does not match the student’s enrollment, banner will display an error message prompting you to enter the other code.

12. **Hours or Units:** Type the total number of hours worked for the current pay period.

13. Type the number of hours worked per work week in the appropriate work week column. The work week columns are the last three columns on the right in the History Earnings block. The number of hours entered in these columns should equal the number of hours entered in the Hours or Units field.

14. Save the time entry. The hint line displays transaction complete, record applied and saved at the bottom of the screen. Funding information should now display in the Time Distribution block.

15. **Index:** If you need to change the default funding click in the index column on the first row of funding to enable the Time Distribution block. Highlight and type over the funding number if it needs to be changed. A row of funding can also be deleted by selecting Record - Clear from the menu bar. Use the arrow down key on the keyboard if you need to add additional funding rows.
16. **Percent:** Highlight and type over the percent if a change is necessary. The total percent field at the bottom must equal 100 when you are finished entering the funding information.

17. **Hours:** Highlight and type over the hours if a change is necessary. The total hours field at the bottom must equal the number of hours entered in the Hours ir Units field when you are finished entering the funding information.

18. Save the funding changes. The hint line displays transaction complete, record applied saved.

19. **Correct Labor Distribution Dollars:** If the total percent and hours fields are not rounding correctly, the hint line will display “*Error* Labor Dist Must Equal 100% and Earnings Hours Must Equal (Hours)”.

<table>
<thead>
<tr>
<th>Time Distribution</th>
<th>Hours</th>
<th>Percent</th>
<th>COA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>30.00</td>
<td>100.00</td>
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</tr>
<tr>
<td></td>
<td>30.00</td>
<td>100.00</td>
<td></td>
</tr>
</tbody>
</table>

If needed, position your cursor in the ID field and use the arrow up and down keys on the keyboard to navigate to additional timecards. When all timecards for your department have been entered, run the Time Card Entry Verification web report to double check your entries.

**Verify Hours Entered:**
Go to [http://www.computing.vt.edu/content/banner-reporting-tools-0](http://www.computing.vt.edu/content/banner-reporting-tools-0), select the Human Resources Reporting System and enter your Banner username and password to access the web report. Select the Timecard Entry Verification report underneath the Verification folder.

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>EClass</th>
<th>Position</th>
<th>Shif</th>
<th>Earn</th>
<th>Tot_Hrs</th>
<th>Rate</th>
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<th>Nov-18</th>
<th>Nov-19</th>
<th>Nov-25</th>
<th>Nov-30</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worker, Student</td>
<td>904-32-5208</td>
<td>Student Wage</td>
<td>010924-00</td>
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<td>WNT</td>
<td>30 $7.00</td>
<td>10</td>
<td>10</td>
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</tr>
<tr>
<td>Employees: 1</td>
<td>Time Cards: 1</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**Retroactive Hours**
If applicable, you can also use this form to enter retroactive hours (i.e., hours worked in a previous pay period that were not entered on the previous pay period's timecard - this might happen because an employee forgot to sign and turn in their time record) and adjustments (e.g., if an employee was paid at a lower rate of pay than they should have received on a previous timecard - this might happen because a status change PAF is completed after the PAF deadline date).

1. In the History Earnings block position your cursor in the next empty row in the Earnings field below the WNT or WHT line you just entered.
2. **Code**: Type RES or REH to enter retroactive straight time pay

- **RES** (Retroactive Student No FICA Tax) is used if the student is enrolled at least half time. (6 hours for undergraduate students, 3 hours for summer school students).
- **REH** (Retroactive Withhold FICA Tax) is used if the student has dropped below half time.

If you type a code that does not match the student's enrollment, Banner will display an error message prompting you to enter the other code.

3. **Hours or Units**: Type the total number of hours worked for which back pay is due.

4. Type the total number of hours worked in the first work week column. You do not need to split out the hours by the dates. The number of hours entered in this column should equal the number of hours entered in the Hours or Units field.

5. Save the time entry. Funding information should now display and can be changed just as with the WNT or WHT entry funding.

6. Indicate on the hard copy time record what payroll the retroactive hours were entered on.
Adjustment Hours:

1. In the History Earnings block position your cursor in the next empty row in the Earnings field below the WNT or WHT line you just entered.

2. **Earnings**: Type SRA (Student Rate Adjustment) or HSR (Hourly Special Rate - used if the student has dropped below half time) to enter an adjustment.

3. **Hours or Units**: Type the total number of hours for which an adjustment is needed.

4. **Sp Rate**: Type the amount per hour that the employee missed.

   Ex. If a student worker was given a raise from $8 to $10 effective the first day of pay period 1 but the status change PAF was not completed until after the deadline date. Worker’s rate on the time card for pay period 1 displayed $8 and he was paid for 3 hours at $8 (3 WHT).

   In pay period 2, you can pay Student Worker for the $2 x 3 hours for which he is owed by entering 3 hours at $2 special rate (3 HSR).

5. **Amount**: Leave this field blank - it will default in when you save this entry.

6. Type the total number of hours again in the first work week column. You do not need to split out the hours by the dates. The number of hours entered in this column should equal the number of hours entered in the Hours or Units field.

7. Save the time entry. Funding information should now display, and can be changed just as with the current hours funds.

8. Indicate on the hard copy time record what payroll the adjusted hours were entered on.
Reconciliation

- The person who enters hours should always run the Time Card Entry Verification web report to double check their entries.

- In addition, the Payroll Office will send each department a Wage Payroll Reconciliation Report.

- The person responsible for reconciliation will compare the time sheets to the Wage Payroll Reconciliation Report. This individual cannot be the employee or the data entry person and preferable not the supervisor.

- The person responsible for reconciliation checks for errors then signs, dates, and files the report. The report must be kept for four years. If the person responsible finds errors they should talk with the Payroll Office to resolve the discrepancy.
Graduate/P14 Timecards - Adjustments
Follow these steps to enter retroactive pay adjustments for graduate and P14 employees. Hours must be entered on the time card entry dates that are listed on the Salary Payroll Schedule. Note: Regular work hours are input by the system and do not need to be entered.

1. Obtain a signed Graduate Assistantship Agreement or a Part Time Faculty Appointment Authorization For Payment - P14A. Maintain the forms in your department in accordance with the retention schedule established by Records Management.

2. Navigate to the PHAHOUR form.

3. Year: Type the year.

4. Payroll ID: Type SA (Salary).

5. Payroll Number: Type the current pay number.

6. Enter Selection Criteria: Either select tab on the keyboard or click Enter Selection Criteria in the Options menu.

7. Orgn: Type the 6-digit department number if you wish to retrieve all department timecards. OR
ID: Type an employee's ID if you wish to retrieve only the timecards for that one employee.

8. OK: Click the Ok button to retrieve the timecards you selected. If you selected an entire department or an employee with multiple timecards place your cursor in the ID field and use the arrow up and down keys on the keyboard to navigate between the timecards.

9. Verify that you are on the timecard on which you want to enter hours. • Check the Posn field to verify the position and suffix number.
10. In the History Earnings block position your cursor in the first empty row below the Earnings field. **Note:** Do not alter the WNT or P14 entry row - this is the system entry for the regular hours.

11. **Earnings:** For a graduate adjustment type RTG (Retroactive Graduate No FICA) or RGT (Retroactive Graduate with hold FICA). For a P14 adjustment type CPA (Corrected Pay Amount).

12. **Hours or Units:** Type 1 to represent 1 unit.

13. **Sp Rate:** Type the amount of back pay which is owed.

14. Save the time entry. The hint line displays transaction complete, record applied and saved at the bottom of the screen. Funding information should now display in the Time Distribution block.

15. **Index:** If you need to change the default funding click in the index column on the first row of funding to enable the Time Distribution block. Highlight and type over the funding number if it needs to be changed. A row of funding can also be deleted by selecting Record - Clear from the menu bar. Use the arrow down key on the keyboard if you need to add additional funding rows.

16. **Percent:** Highlight and type over the percent if a change is necessary. The total percent field at the bottom must equal 100 when you are finished entering the funding information.

17. **Hours:** Highlight and type over the hours if a change is necessary. The total hours field at the bottom must equal the number of hours entered in the Hours or Units field when you are finished entering the funding information.

18. Save the funding changes. The hint line displays transaction complete, record applied saved at the bottom of the screen.
19. **Correct Labor Distribution Dollars**: If the total percent and hours fields are not rounding correctly, the hint line will display “*Error* Labor Dist Must Equal 100% and Earnings Hours Must Equal (Hours)”.  

![Time Distribution Table]

<table>
<thead>
<tr>
<th>Hours</th>
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<th>COA</th>
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<tbody>
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<tr>
<td>50</td>
<td>50.00</td>
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</tr>
<tr>
<td>1.00</td>
<td>100.00</td>
<td></td>
</tr>
</tbody>
</table>

20. If needed, position your cursor in the ID field and use the arrow up and down keys on the keyboard to navigate to additional timecards.

**Verify Hours Entered:**  
Go to [http://www.computing.vt.edu/content/banner-reporting-tools-0](http://www.computing.vt.edu/content/banner-reporting-tools-0), select the Human Resources Reporting System and enter your Banner username and password to access the web report. Select the Timecard Entry Verification report underneath the Verification folder.

**Reconciliation**

- The person who enters hours should always run the Time Card Entry Verification web report to double check their entries.

- In addition, the Payroll Office will send each department a Salary Payroll Reconciliation Report.

- The person responsible for reconciliation will compare the time sheets to the Salary Payroll Reconciliation Report. This individual cannot be the employee or the data entry person and preferable not the supervisor.

- The person responsible for reconciliation checks for errors then signs, dates, and files the report. The report must be kept for four years. If the person responsible finds errors they should talk with the Payroll Office to resolve the discrepancy.
Staff Timecards - Overtime/Adjustments

Follow these steps to enter overtime hours and on call pay adjustments for salary employees. Hours must be entered on the time card entry dates that are listed on the Salary Payroll Schedule. **Note:** Regular work hours are input by the system, and do not need to be entered.

1. Obtain a completed *Monthly Leave and Work Report* signed by both the employee and the supervisor or approved leave report from the leave system indicated overtime hours worked. The supervisor must sign the record to verify the number of hours worked and approve the resulting pay.

   Note that the standard work week runs from Saturday morning at 12:01am to the following Friday at midnight (12:00am). Hours worked in excess of 40 within the work week by non-exempt employees must be compensated at the rate of time and a half. Occasionally, exempt employees that have been approved by Human Resources may be compensated for overtime hours worked at the straight time pay rate.

2. Navigate to the PHAHOUR form.

3. **Year:** Type the year.

4. **Payroll ID:** Type SA (Salary).

5. **Payroll Number:** Type the current pay number.

6. **Enter Selection Criteria:** Either select tab on the keyboard or click Enter Selection Criteria in the Options menu.

   - **Orgn:** Type the 6-digit department number if you wish to retrieve all department timecards.
   - **ID:** Type an employee's ID if you wish to retrieve only the timecards for that one employee.

7. **OK:** Click the Ok button to retrieve the timecards you selected. If you selected an entire department or an employee with multiple timecards place your cursor in the ID field and use the arrow up and down keys on
the keyboard to navigate between the timecards.

9. Verify that you are on the timecard on which you want to enter hours.
   • Check the Posn field to verify the position and suffix number.

10. In the History Earnings block position your cursor in the first empty row below the Earnings field. **Note:** Do not alter the REG entry row in any way - this is the system entry for the regular hours.

11. **Code:** Type either OTH or OTP to enter overtime hours.
    - OTH is used for all non-exempt employees.
    - OTP is used for approved exempt employees.

12. **Hours or Units:** Type the total number of overtime hours worked for the pay period. **Please Note:** Do not calculate the 1.5 hours for non-exempt employees. The system will calculate these hours. If an employee works 5 hours overtime enter 5 hours in the Hours/Units field.

13. Click in the dates column. The number of hours entered in the Hours or Units field will display.

14. Save the time entry. The hint line displays transaction complete, record applied and saved at the bottom of the screen. Funding information should now display in the Time Distribution block.

15. **Index:** If you need to change the default funding click in the index column on the first row of funding to enable the Time Distribution block. Highlight and type over the funding number if it needs to be changed. A row of funding can also be deleted by selecting Record - Clear from the menu bar. Use the arrow down key on the keyboard if you need to add additional funding rows.

16. **Percent:** Highlight and type over the percent if a change is necessary. The total percent field at the bottom must equal 100 when you are finished entering the funding information.

17. **Hours:** Highlight and type over the hours if a change is necessary. The total hours field at the bottom must equal the number of hours entered in the Hours or Units field when you are finished entering the funding information.

18. Save the funding changes. The hint line displays transaction complete, record applied saved at the bottom of the screen.

19. **Correct Labor Distribution Dollars:** If the total percent and hours fields are not rounding correctly, the hint line will display “*Error* Labor Dist Must Equal 100% and Earnings Hours Must Equal (Hours)”.

If needed, position your cursor in the ID field and use the arrow up and down keys on the keyboard to navigate to additional timecards.
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On Call Pay Adjustments:

1. In the History Earnings block, position your cursor in the Code field in the first empty row.

   - **Code**: Type CAL (On Call Pay) to enter supplemental pay for on call shift work.

2. **Hours or Units**: Type the number of shifts/days that the employee was on call.

3. **Sp Rate**: Type the special pay rate amount (e.g., if an employee is paid $6 for each shift that they carry a pager, the entry would be 6.00).

4. Save the time entry. The hint line displays transaction complete, record applied and saved at the bottom of the screen. Funding information should now display and can be changed.

When all on call pay adjustments for your department have been entered run the Time Card Entry Verification web report to double check your entries.

**Verify Hours Entered:**
Go to [http://www.computing.vt.edu/content/banner-reporting-tools-0](http://www.computing.vt.edu/content/banner-reporting-tools-0), select the Human Resources Reporting System and enter your Banner username and password to access the web report. Select the Timecard Entry Verification report underneath the Verification folder.
PAF Permanent Routing

Follow these steps if you wish to set up default routing information for the PAF process.

1. Navigate to the NTRROUT form.

2. Approval Category: Position the cursor in this field and click on the down arrow button to bring up the list of values. Select the PAF category code that you wish to set up permanent routing for – Please Note: Each code must be done separately.

3. Level Code: Position the cursor in the first blank row of the level code column.

4. User ID: Complete the User ID fields, as you would on the routing step of a PAF.

5. Save the routing information. The hint line will display “Transaction complete, records applied and saved” at the bottom of the screen. Continue until you have set up permanent routing for each of the PAF approval categories you would like.
Creating a Personal Menu

Users have the options of creating a personal customized menu (My Banner), rather than using the standard VT HR (Departmental Use) Menu.

1. My Banner is located at the bottom of the screen. Users may either scroll down, or close the first few folders to see it. Select My Banner to view forms that may have been added to the personal menu.

2. To update the contents of the personal menu double click on Organize My Banner underneath the My Banner folder.

3. The Personnel Menu Maintenance Form (GUAPMNU) will appear.

4. A quick method to add forms to your personal menu is to type the banner form name directly onto the right side of the GUAPMNU form. Click in the first field beneath Object. Then type the banner form name of the form you wish to add.
5. Continue to enter the Banner form name in each row to create your list.

<table>
<thead>
<tr>
<th>Object</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PWIEMPV</td>
<td>Employment Verification Form</td>
</tr>
<tr>
<td>PWIABIO</td>
<td>Employee Biographic Information Form</td>
</tr>
<tr>
<td>PHAHOURL</td>
<td>On-line Time Entry</td>
</tr>
</tbody>
</table>

6. When the form name and description are listed on the right hand side, you are ready to save and exit the GUAPMNU form. You will need to exit out of Banner and log in again to see your changes.

7. The items that were listed on the right will now appear in the My Banner folder.