<table>
<thead>
<tr>
<th>Name</th>
<th>Extension</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kim Dight</td>
<td>x3-9637</td>
<td><a href="mailto:kdight@gmu.edu">kdight@gmu.edu</a></td>
</tr>
<tr>
<td><strong>Director of Finance and HR</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Irene Mills</td>
<td>x3-8862</td>
<td><a href="mailto:lmills2@gmu.edu">lmills2@gmu.edu</a></td>
</tr>
<tr>
<td><strong>Associate Director of Budget</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Janice Cohen</td>
<td>x3-8612</td>
<td><a href="mailto:jcohen9@gmu.edu">jcohen9@gmu.edu</a></td>
</tr>
<tr>
<td><strong>Grants Administrator</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Olga Shchepina</td>
<td>x3-8635</td>
<td><a href="mailto:oshchepi@gmu.edu">oshchepi@gmu.edu</a></td>
</tr>
<tr>
<td><strong>Budget Analyst – Grants</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sarah Fink-Youngbar</td>
<td>X3-8733</td>
<td><a href="mailto:sfinkyou@gmu.edu">sfinkyou@gmu.edu</a></td>
</tr>
<tr>
<td><strong>Budget Analyst</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shirley Steppe</td>
<td>x3-5457</td>
<td><a href="mailto:ssteppe2@gmu.edu">ssteppe2@gmu.edu</a></td>
</tr>
<tr>
<td><strong>Fiscal Technician</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Joan Mlotkowski</td>
<td>x3-8786</td>
<td><a href="mailto:jmlotkow@gmu.edu">jmlotkow@gmu.edu</a></td>
</tr>
<tr>
<td><strong>HR Specialist</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fax for CHSS Dean’s Office</td>
<td></td>
<td>x3-8714</td>
</tr>
</tbody>
</table>
COMMONLY USED ACRONYMS

- AP - Accounts Payable  ○ AY - Academic Year  ○ BTS - Budget Tracking System
- CHSS - College of Humanities and Social Sciences  ○ DE - Direct Expenditures
- EDWP – Enterprise Data Warehouse for Finance & Student Datamarts
- e-Print - Banner report distribution system that uses the browser to retrieve and print Banner reports
- ETF - Equipment Trust Funds
- E&G - Educational and General (State Funding)
- EZ-EPAF / EPAF - Electronic Approval
- eVA – Virginia Web-based Procurement Tool
- F&A Rate - Facilities and Administration % (Indirects)
- F&B - Food and Beverage
- FCF – Funding Change Form
- FICA - Federal Old-age Insurance Contribution (Social Security)
- FOAPL - Fund / Organization / Account / Program / Activity / Location
- FRDA - Faculty Research and Development Award
- FTE - Full Time Equivalent
- FY - Fiscal year (July 1 - June 30)
- GL - Graduate Lecturer  ○ GMUF - George Mason Foundation
- GPA – Graduate Professional Assistant
- GRA - Graduate Research Assistant
- GTA- Graduate Teaching Assistant
- ICR - Indirect Cost Recovery
- INB - Internet Native Banner
- IND - Indirects
- JV - Journal Voucher
- LWOP - Leave Without Pay
- OALPD - Office of Adult Learning and Professional Development
- OCPE - Office of Continuing and Professional Education
❖ OIPS - Office of International Programs and Services
❖ OSP - Office of Sponsored Programs
❖ P&T - Promotion and Tenure
❖ P-card - Purchasing card (Master Card)
❖ PI - Principal Investigator
❖ PO - Purchase Order
❖ PR - Purchase Requisition
❖ SRA - Provost Summer Research Awards
❖ XEGP - Permanent Budget transfers within Educational and General Funds
❖ XEGT - Temporary Budget transfers within Educational and General Funds
BUDGET MANAGEMENT- Useful links

CHSS Finance and HR website: [http://chss.gmu.edu/staff](http://chss.gmu.edu/staff)
- Grant Buyout Policy
- Funding Change Form
- Journal Voucher
- GA, GL, and PT offer letter templates
- Tuition Grant Authorization Form and Workflow
- EA Hardcopy Template
- Food & Beverage Authorization
- Travel Request System: [http://travel.gmu.edu](http://travel.gmu.edu)
- Classified & Faculty Evaluation, Transaction, and Separation Forms
- Overtime and Salary Increase

Budget Tracking System (BTS): [http://bts.gmu.edu](http://bts.gmu.edu)
- Enter Fall and Spring GA,GL, and PT assignments
- Funding Change Forms
- Generate Contracts
- Teaching Load
- Raise Review
- Tuition Waivers
- Enter EZ-EPAF

Office of the Provost:
[http://provost.gmu.edu](http://provost.gmu.edu)
- PT (GL) and GA Pay Matrix Rates
- Graduate Student Hiring Rules and Procedures
- Enrollment data
- Subsidized Graduate Health Insurance eligibility requirements and Q&As

Banner: [https://patriotweb.gmu.edu/admin/](https://patriotweb.gmu.edu/admin/)

PART-TIME FACULTY AND GRADUATE SUPPORT GUIDELINES SUMMARY

<table>
<thead>
<tr>
<th>Graduate Teaching/Research</th>
<th>Graduate Lecturer</th>
<th>Adjuncts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GA or GR</strong></td>
<td><strong>GL</strong></td>
<td><strong>PO or FV</strong></td>
</tr>
<tr>
<td>8/25-1/9 (Fall) • 1/10-5/24 (Spring)</td>
<td>8/25-12/9 (Fall) • 1/25-5/9 (Spring)</td>
<td>8/25-12/9 (Fall) • 1/25-5/9 (Spring)</td>
</tr>
<tr>
<td>9 hrs/week (FT) - .25 • 10 hrs/week (PT) - .125 GRA no FTE in Banner</td>
<td>three credit classes (full time) - .50 FTE</td>
<td>three credit class (part time) - .25 FTE</td>
</tr>
<tr>
<td>the waivers F-1 or J-1 20 hrs/week • all others 29 hrs/week (except during the summer - no class, 40 hrs/week)</td>
<td>credits or .75 FTE</td>
<td>credits or .75 FTE</td>
</tr>
</tbody>
</table>
| **FTE**                   | **max. hours/FTE** requirements pay | **matrix restrictions** entered in the BTS **Title for EAs in banner**
| **GA matrix rates**       | **Adjunct matrix rates** | **Adjunct matrix rates** |
| **related activities (not related)** | **Can engage in other employment** | **Can engage in other employment** |
| **including**             | **August and December** | **August and December** |
| **fellowship**            | **GTA or GRA** | **course and section number** |
| **funds**                 | **3.** | **1.** |

1. Have an assistantship (TA, RA) during the semester they receive
2. Earn at least $4,000 / academic year
3. Must take at least 6 credits
4. Full time lecturers must take at least 6 credits
5. Part-time lecturers must take at least 3 credits
6. Cannot be a degree seeking student

**Waivers pre-requisites (out of the department allocation (GTAs and GRAs)**

- Awarded to the highest quality students; NOT a payment for any work
- Minimum award amount is $500/semester.
- Students without an assistantship must take at least 9 credits and students with an assistantship must take at least 6 credits during the semester they receive the award. (some exceptions apply)
- The award amount will first be applied to the student’s account to go towards any unpaid balance. Any leftover amount will then be issued as a check after the last drop/add date and sent directly to the student.

**NOTES (APPLICABLE TO GAs, GLs AND ADJUNCTs):**

- *Exceptions to the minimum 6 credit rule for waivers and fellowships*
- Anyone who will be in the BTS upload and has never been paid by GMU needs a skeleton EPAF in Banner • GLs' skeletons should be entered as "Original/Current Hire, Skeleton GTA"
Overtime eligible (non-exempt) full-time classified employees may not be awarded adjunct appointments.

FT instructional, admin faculty and classified employee at GMU teaching a course in addition to regular assignments are considered an overload.

- Instructional faculty - Hired with a FV position number in BTS; admin faculty, classified - Hired with a PO position number in BTS
- Contracts signed by the Provost office + current supervisor.

GAs should be available to work 2 weeks before classes start. They are not expected to work over breaks and should be compensated for any significant work that
The College of Humanities and Social Sciences policies regarding sponsored program activity are specified below. These policies are effective immediately and apply to all proposals submitted FY 2017 hereafter. Questions on these policies can be addressed to the CHSS Post Award Services Director (Janice Cohen), or the CHSS Associate Dean, Research (Michele Schwietz).

With respect to budgets, please note that the principal investigator is responsible for ensuring that the research activity remains within budget. It is the responsibility of the PI and the department chair to identify an appropriate source of funds to cover any outstanding expenses on accounts. We do not have funds available in the College to help in covering cost overruns.

**EFFORT ON GRANTS**

The amount of salary charged or shown as cost share on a sponsored project should be consistent with effort spent on the project. The timing of salary charges should be aligned with when effort is performed (i.e., during academic and summer periods) and consistent with the effort commitments made at the time of proposal and budget submission.

PIs are required to contribute some effort to sponsored projects either as a direct charge or cost share. This requirement does not apply to projects for equipment/instrumentation, dissertation and training grants and limited purpose grants such as travel and conference support.

Effort committed on sponsored projects should be devoted exclusively to the activities supported by that project or projects, with the salary charges to each aligning with the effort expended.
Cost share effort must be tracked consistent with the requirements of Policy 4016 Cost Sharing. This requirement does not apply to projects for equipment/instrumentation, dissertation and training grants and limited purpose grants such as travel and conference support.

Faculty may not charge summer salary only to sponsored projects unless the scope of work will occur during the summer months only. Faculty work on sponsored projects during the academic year and the summer should follow college guidelines. For each month of summer work charged to the project, a minimum of 5% of academic year salary plus benefits should be charged.

Faculty effort on proposed projects must be reviewed and approved by the Department Chair and the CHSS Dean’s office prior to proposal submission. Faculty are expected to follow the approved budget and effort commitments throughout the course of the project or seek budget revisions in accordance with university, college and sponsor policies. Revisions to faculty effort must be approved by the CHSS Dean’s Office when they conflict with previously approved academic year/summer effort charges.

Individuals whose payroll is charged or whose effort is identified as committed cost sharing on projects must have worked on the project and be documented in accordance with Policy 4015 Payroll Certification on Federally Sponsored Projects.

**TEACHING LOADS AND COURSE BUYOUTS**

For faculty seeking course buyouts, all new grants shall be budgeted according to the following policy as of July 1, 2017. Tenured and Tenure-track faculty members charging labor to grants and contracts will provide 15% of academic year salary plus benefits to buy out the first course in an academic year, 15% for the second course, and 25% for the third course.

Term faculty members charging labor to grants and contracts must charge 12.5% of academic year salary plus benefits for each course bought out.

Faculty who do not have sufficient resources to pay for buyout in a given semester may accrue course buyout by charging the equivalent of 15% of academic year salary over two successive semesters. The accumulated one-course buyout may then be used during the second semester with approval of the chair.
Every faculty member is expected to teach at least one course per year and is expected to engage in service. Any exceptions to this policy must be negotiated with the dean prior to submission of the grant or fellowship proposal.

For purposes of this policy, faculty members with administrative buy-outs of their teaching or contractual teaching loads less than 2-2 must treat those reductions as grant buy-downs. For example, someone with a one-course administrative buy-down must charge their grant as a second course reduction.

Any other financial arrangement must be agreed to in advance by the dean.

**ADDITIONAL RESEARCH BUYOUT**

Faculty who charge academic year salary to a grant in excess of that required for course buyout(s) can receive a spending credit equal to 50% of the excess buyout. This credit will be returned as Facilities and Administrative (F&A, also known as “indirects”) and may be used for DE such as equipment, travel, and supplies or may be applied to summer salary cap overage on grants that limit compensation to a salary capped amount.

**SALARY CAP ADMINISTRATION**

Certain sponsors, such as the National Institutes of Health (NIH), the U.S. Department of Justice (DOJ), and other funding agencies impose a limit or “cap” on the annual rate of salary they will reimburse for a given amount of effort.

When an individual's salary exceeds the salary cap established by the sponsor, the salary cap overage between the individual's actual salary and the maximum amount allowed under the cap for that percent of effort, must NOT be charged to another Federal or sponsored award.

**Academic Year -** During the academic year, the salary cap overage will be covered by the College of Humanities and Social Sciences upon approval by the Dean’s Office. The academic year salary cap overage constitutes voluntary, committed cost sharing.
In cases where the faculty member may be seeking one or more course buyouts paid by the sponsor, the grant budget must cover the entire amount needed for the course buyout(s) as stated in CHSS faculty workload policies. None of the salary cap overage paid by the College of Humanities and Social Sciences will apply to the amount needed for the course buyout(s).

**Summer** - During the summer, the salary cap overage must be covered by the discretionary funds (Indirect or Pool Org) of the individual whose salary exceeds the salary cap. If the salary capped individual does not have enough funds to cover the salary cap overage through their discretionary funds (Indirect or Pool Org), the summer pay will be limited to the salary cap amount paid by the sponsor.

**Sponsor Information**

NIH provides a list of current and historical salary caps at

NIH Notice, Salary Limitation on Grants Cooperative Agreements, and Contracts

DOJ Limit on Use of Award Funds for Employee Compensation
https://ojp.gov/financialguide/DOJ/PostawardRequirements/chapter3.9b.htm

**INDIRECT COSTS**

The provisional organized research indirect rates effective July 1, 2017 are:

- 52.0% On-Campus
- 26.0% Off-Campus Remote (performed outside the commuting area of the university)
- 27.4% Off-Campus Adjacent (off-campus activities performed within the commuting area of the university)

DOD contracts and subcontracts organized research rate effective July 1, 2017 are:

- 54.3% On-Campus
- 28.3% Off-Campus Remote (performed outside the commuting area of the university)
- 29.7% Off-Campus Adjacent (off-campus activities performed within the commuting area of the university)
The complete listing and reference to the F&A Negotiation Agreement and applicable indirect rates can be found on the OSP website. As these rates are negotiated every few years, refer to OSP for most current applied rates.

These indirect rates include all personnel and direct expenses, with the following exceptions:

- Equipment purchases defined as stand-alone with a per-piece cost exceeding $5,000
- Tuition payments, Subsidized Graduate Health Insurance, and Fellowships
- Participant Support Costs
- Subcontract payments over the initial $25,000 payment to the subcontractor
- Rent payments

For a contract that generates $10,000 in indirect, a typical on-campus distribution is:

<table>
<thead>
<tr>
<th></th>
<th>%</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>University</td>
<td>29.4%</td>
<td>$2,940</td>
</tr>
<tr>
<td>Provost</td>
<td>34.3%</td>
<td>$3,430</td>
</tr>
<tr>
<td>BRL</td>
<td>2.00%</td>
<td>$200</td>
</tr>
<tr>
<td>College</td>
<td>17.15%</td>
<td>$1,715</td>
</tr>
<tr>
<td>PI</td>
<td>10.29%</td>
<td>$1,029</td>
</tr>
<tr>
<td>Department</td>
<td>6.86%</td>
<td>$686</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>$10,000</td>
</tr>
</tbody>
</table>

The above distribution can vary. When projects are coordinated across colleges, CHSS generally follows the practice of distributing College/Department/PI indirects proportionate to the labor distribution for each perspective college budgeted.
EXAMPLES OF ONE SEMESTER AND TWO SEMESTER BUYOUTS (For One Course)

The cost of a course buyout(s) for instructional faculty is determined by their annual salary and the number of courses they wish to buyout, regardless of the time period of the grant. We recognize that many grant periods of performance to not align exactly with the University academic year. However, the dollar amount charged to the grant for a buyout must equate to the rates established by the College.

For Example:
9 month faculty member
Annual Salary: $60,000
One Course buyout: $9,000 (15% of annual salary)
Two Course buyout: $18,000 (30% of annual salary)
Three Course buyout: $33,000 (55% of annual salary)

The sample Funding Change below reflects one course buyout over one semester and one course buyout spread over two semesters. Note that in both cases, the course buyout is equal to 15% of annual salary ($60,000 x .15 = $9,000).

One Course Bought Out in One Semester Name: Smith, Professor; Employee Type: 9-month Instructional; Annual Salary: $60,000; Effective Date: 8/25/17 to 01/09/18
(Paid for over 1 semester, 9 pay periods)

<table>
<thead>
<tr>
<th>Labor Distribution</th>
<th>Org: 1-XXXXX</th>
<th>70%</th>
<th>21,000</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fund: 2-XXXXX</td>
<td>30%</td>
<td>9,000</td>
</tr>
<tr>
<td>Total Semester Salary</td>
<td></td>
<td></td>
<td>30,000</td>
</tr>
</tbody>
</table>

One Course Bought Out Over Two Semesters Name: Smith, Professor; Employee Type: 9-month Instructional; Annual Salary: $60,000; Effective Date: 8/25/17 to 05/24/18
(Paid for over 2 semesters, 18 pay periods)

<table>
<thead>
<tr>
<th>Labor Distribution</th>
<th>Org: 1-XXXXX</th>
<th>85%</th>
<th>51,000</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fund: 2-XXXXX</td>
<td>15%</td>
<td>9,000</td>
</tr>
<tr>
<td>Total AY Salary</td>
<td></td>
<td></td>
<td>60,000</td>
</tr>
</tbody>
</table>
### DE Drill by Org

- All charges posted to your DE (70000-79999) account (including JVs)Tabs display summary by month/year, by date range and travel by faculty
- Located in folder: Administrative; Shared Reports; Dept. Reports; CHSS; CHSS Decentralized

### Dept. Financial Reports

- Financial overview of the orgs under your department.
- Balances for your E&G, Indirect, Pool, University Life, Sponsored Programs, and Unrestricted Carry Over orgs by selecting the separate tabs.
  - Located in folder: Administrative; Shared Reports; Dept. Reports; CHSS; CHSS Decentralized

### All Labor and Expenses by Org or Fund for Reconciliation

- User defines look up date range, ready to use with the CHSS reconciliation template
- Separate tabs for labor and expenses, sorted by date, account number, and last name
- Located in folder: Administrative; Shared reports; Reconciliation; Reconciliation Welcome Page

### Budget Drill by Org

- All budget transfers that have been processed for your org
- Located in folder: Administrative; Shared Reports; Dept. Reports; CHSS; CHSS Decentralized; CHSS- Budget Drill

### Budget Transfer Detail by Date Range

- All budget transfers done in a month for all orgs in your department
- Located in folder: Administrative; Shared Reports; Dept. Reports; CHSS; CHSS Decentralized; CHSS- Budget Transfer Detail by Date Range

### Roster Information for Departments

- A list of your faculty, admin faculty, and classified salaries, titles, positions, etc.
- Adjunct, graduate assistants, graduate lecturer rosters each displayed in a separate tab
- Labor distribution tab shows what orgs/funds their salary has been charged to so far this year by pay period
- Funding distribution tab shows what orgs/funds their salary will be charged to in the future
- Located in folder: Administrative; Shared Reports; Dept. Reports; CHSS; CHSS Decentralized
- Employee Detail tab shows their employee class (9 or 12 month), their rank and tenure descriptions
DEAN’S START-UP COMMITMENTS

Recruiting tenure line faculty with significant research potential and scholarly activities is highly competitive, and providing candidates with a reasonable start-up package can be vital to positive outcomes. The dean maintains Faculty Startup Org. 103404 to supplement department resources, in order to provide funding for new faculty’s transition to the university.

New office computer and accessories are provided separately through the dean’s office and are not funded from the Startup Org. All such equipment is university property. Newly hired faculty typically have Startup funds available for their first two fiscal years, and timing is specified in offer letters.

Any spending limits by category are specified in offer letters. Categories are not fungible. Typical costs covered by startup funds include:

- Travel to conduct research on site, such as appropriate libraries, archives and field sites
- Travel to conferences and meetings where the faculty member is engaging in professional work by either presenting a paper or chairing a panel (maximum $750.00 total).
- Wages research assistant for a limited time (must be hired as hourly employee and submit timesheets per Mason policies).
- Books and digital media related to research (maximum $500.00 total). Note that these are the property of Mason and not the faculty member.
- Relocations costs (if available, this will be specifically defined in the offer letter, otherwise not available).

Occasionally, special arrangements are made to provide additional support. These are generally provided when there is an expectation for faculty to obtain future outside sponsored support.
Examples include:

- Summer salary support (1 month max typically, in order to apply for external funding, specifically documented in the offer letter)
- Major scientific equipment and supplies
- Lab or Center space and/or equipment
- Participant support

Faculty startup funds are not considered personal compensation and cannot be used to supplement a faculty member’s academic year salary or to cover personal expenses (except for relocation as specified in the offer letter).

These specific categories of expense are explicitly **NOT** available using dean Startup funds:

- Classroom materials
- Travel support for individual other than the new faculty member (i.e.; cannot be used to provide conference support for graduate students or others)
- Travel to attend a conference
- Professional dues and memberships
- Printers, fax machines, office equipment
- Ipads, cameras, cell phones, other electronic devices, unless specifically included in offer letter
- Gifts, donations, any costs unrelated to faculty research or scholarship activities
- Visa fees
- Book subventions and indexing

Faculty will follow all Mason purchasing guidelines and will coordinate all expenditures with their department / program administrative staff.

Startup funds are investments by the College of Humanities and Social Sciences in the research and professional careers of its faculty. A faculty member who chooses to resign from the university, upon accepting the new position, is no longer authorized to use Startup funds.
CHSS Allocated Tuition Waivers

- Allocation is announced in memos sent each semester and updated in BTS.
- Department will enter all eligible students in BTS “Waivers” screen.
- Dean’s Office will send updates to Financial Aid weekly.

Tuition Grants

- Charged to grant or department org.; budget acct. 70000; actual acct. 78510 (Masters) or 78515 (Doctors).
- The use of department DE or a grant to pay a student’s tuition.
- Use the WorkFlow application and then pick FIN_Tuition Award Authorization under “My Processes”:
  https://patriotweb.gmu.edu/admin

Graduate Assistantships

- Charged to grant or department org.; acct. 61190.
- Allocation for the following year is announced in memos sent in Spring.
- Department prepares contracts and puts them into BTS for the upload.
- After the upload changes need to be handled with EZ-EPAFs.
- An upload is done in the fall and the spring.
- Centrally Funded Fellowship awardees should not be hired as Graduate Research Assistants. These Fellowships are awards and no work component may be attached.
**FTE**

**DEFINITION:** acronym for FULL TIME EQUIVALENCY. FTE can refer to a Mason staff member (ex.: faculty, admin faculty, classified, GA or adjuncts) hours worked; to a faculty teaching load or to student enrollment credits. It is a calculation used to represent the ratio of the individual in question against a standardized unit of measurement for comparison purpose.

<table>
<thead>
<tr>
<th>UNIT INDIVIDUAL</th>
<th>HOURS WORKED</th>
<th>TEACHING LOAD (CLASSES)</th>
<th>CREDITS</th>
<th>1 FTE equivalency (E)</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty</td>
<td>Full time 9 month or 12 month = 1 FTE</td>
<td>1 three-credits class = 0.25 FTE</td>
<td></td>
<td>40 hrs or 12 credits</td>
<td>A faculty member who works full time is 1 FTE (in terms of salary). However, if they teach 3 classes in the Fall and 2 in the Spring = 15 credits / 12 = 1.25 FTE or 0.75 (Fall) and 0.50 (Spring) teaching load.</td>
</tr>
<tr>
<td>Admin Faculty or Classified Staff</td>
<td>40 hrs/week = 1 FTE</td>
<td></td>
<td></td>
<td>40 hrs</td>
<td>A part time admin faculty (30 hrs/week) = 30 hrs/week / 40 = 0.75 FTE</td>
</tr>
<tr>
<td>GTA / GRA</td>
<td>20 hrs/week = 0.25 FTE</td>
<td></td>
<td></td>
<td>80 hrs</td>
<td>A part time graduate teaching assistant = (10 hours / week) / 80 hrs = 0.125 FTE NOTE: GRA FTE does not load to Banner.</td>
</tr>
<tr>
<td>Graduate Lecturer</td>
<td>2 three-credits class = 0.50 FTE</td>
<td></td>
<td></td>
<td>12 credits</td>
<td>A graduate lecturer who teaches 1 two-credits class = 2 credits / 12 = 0.1666 FTE</td>
</tr>
<tr>
<td>Adjuncts</td>
<td>1 three-credits class = 0.25 FTE</td>
<td></td>
<td></td>
<td>12 credits</td>
<td>An adjunct who teaches 7 credits in total = 7 credits / 12 = 0.5833 FTE</td>
</tr>
<tr>
<td>Students</td>
<td>15 credits undergrad (or 5 students) = 1 FTE &amp; 12 credits grad (or 4 students) = 1 FTE</td>
<td></td>
<td></td>
<td>4.7 seats 15 credits undergrad 12 credits grad</td>
<td>A target enrollment of 781 seats = 781 / 4.7 = 166.17 FTE on average. A 3 credits class with 10 undergrad students and 15 grad students enrolled = 30 undergrad credits / 15 + 45 grad credits / 12 = 5.75 FTE</td>
</tr>
</tbody>
</table>

**Calculation** = quantity (of hrs, classes or credits) for the individual ÷ 1 FTE equivalency (column E below)
### SUMMER GRADUATE ASSISTANTS

<table>
<thead>
<tr>
<th><strong>Summer GTA</strong></th>
<th><strong>Summer GRA</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Summer effective dates</strong></td>
<td>Summer term can be active from one summer session to three (dates between May 25- August 24) Follows Adjunct Summer Term dates</td>
</tr>
<tr>
<td><strong>Assignment</strong></td>
<td>Instructor of record for a summer course</td>
</tr>
<tr>
<td><strong>Other employment restrictions</strong></td>
<td>Can engage in other employment</td>
</tr>
<tr>
<td><strong>Pay matrix</strong></td>
<td>adjunct matrix rates</td>
</tr>
<tr>
<td><strong>Position pre-fix</strong></td>
<td>GL</td>
</tr>
<tr>
<td><strong>Requirements</strong></td>
<td>Do not have to be enrolled in classes during the summer</td>
</tr>
<tr>
<td><strong>Waiver eligibility</strong></td>
<td>$4k from academic related activities in the previous semester and assistantship in the previous fall and/or spring. OR Assistantship in the summer *Do not have to be enrolled in 6 credits in the summer to receive summer waivers</td>
</tr>
<tr>
<td><strong>Hiring process</strong></td>
<td>Summer Upload</td>
</tr>
<tr>
<td><strong>Title in Banner</strong></td>
<td>The course they are teaching</td>
</tr>
<tr>
<td><strong>Funds</strong></td>
<td>Summer Instructional Orgs</td>
</tr>
<tr>
<td><strong>Taxes</strong></td>
<td>Students not enrolled in summer courses are subject to FICA withholding (unless they are exempt under a special rule for certain F-1 and J-1 students).</td>
</tr>
</tbody>
</table>
RECORDS MANAGEMENT

Records Management is a division of GMU Library that assists you with retention and disposition of your temporary records. All records that are still active and needed for daily operations need to be retained with the department until they become inactive. When they become inactive, and need to be retained for a finite period of time for other administrative, fiscal, legal or historical purposes, the records (paper and electronic) are eligible to be sent to Records Management.

State Record retention guidelines

**HUMAN RESOURCES RECORDS**

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eligibility Verification Form and Records (I-9)</td>
<td>3 years after date of hire or 1 year after termination date, whichever is longer</td>
</tr>
<tr>
<td>Employee Personnel Records – Classified/In PMIS Database</td>
<td>5 years after termination or until resolution of personnel issues, whichever is longer</td>
</tr>
<tr>
<td>Employee Personnel Records – Wage Employees</td>
<td>5 years after separation or until closure of unresolved personnel issues</td>
</tr>
<tr>
<td>Position Classification and Description Files</td>
<td>Until elimination of position or as long as administratively useful</td>
</tr>
<tr>
<td>Promotion/Demotion, Layoff, Termination, or Tenure Records</td>
<td>5 years</td>
</tr>
<tr>
<td>Recruitment, Hiring, Interview, and Selection Records</td>
<td>3 years from the date position is filled</td>
</tr>
<tr>
<td>Student Employee Personnel Records</td>
<td>5 years after last employment</td>
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</table>

**FISCAL RECORDS**

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable (purchase orders, invoices, billings, and other related documents)</td>
<td>3 years or until audit, whichever is longer</td>
</tr>
<tr>
<td>Certificates of Deposits (Cash Deposits)</td>
<td>3 years or until audit, whichever is longer</td>
</tr>
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</table>

**COLLEGE AND UNIVERSITY RECORDS**

<table>
<thead>
<tr>
<th>Record Type</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Retain</td>
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</tr>
<tr>
<td>Course Evaluations</td>
<td>1 year or in accordance with college/university policy, whichever is greater,</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Faculty Course Assignments/Schedules</td>
<td>3 years after end of semester</td>
</tr>
</tbody>
</table>

**TO TRANSFER RECORDS TO RM FOR STORAGE**

1. Only records center boxes can be stored in the George Mason University Records Center (please request them @ Fenwick Library, Room C201)
2. You should file the materials by category but you may place more than one category of records in a box
3. Labels can be found on the following link: [http://recordsmanagement.gmu.edu/boxlabel.pdf](http://recordsmanagement.gmu.edu/boxlabel.pdf)
4. 3 sets of labels should be prepared (One to attach on the boxes, one to forward to Records Management and one to retain for your records)
5. Contact RM for box pick up: Email: scarte25@gmu.edu or TEL 703.993.2201. FAX 703.993.8911

*More information can be found on [http://recordsmanagement.gmu.edu/guidelines.html](http://recordsmanagement.gmu.edu/guidelines.html)*
## ACCOUNT CODES

<table>
<thead>
<tr>
<th>Account Subgroup</th>
<th>Account</th>
<th>Account Code Desc</th>
<th>Account Subgroup</th>
<th>Account</th>
<th>Account Code Desc</th>
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<tr>
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<td>Administrative Salaries Budget Pool</td>
<td>Furn &amp; Equip less than $5k after 7.1.10</td>
<td>748882</td>
<td>Medical Equip less than $5000</td>
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<td>Travel-State Vehicle</td>
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<td>Candidate Meals</td>
</tr>
</tbody>
</table>
HR Customer Service Center  x3-2600  hr@gmu.edu

- Taxes
- Direct Deposit
- Leave Balances
- Employment Verifications
- Timesheets (approver changes, proxy access requests, all timesheet questions)
- Deductions

April De La Rosa, Talent Acquisition Manager  x3-2659  Adelaro3
Michelle Lim, HR Faculty Business Partner  x3-3665  mlim1
Megan Kirk, HR Consultant  x3-3551  mkirk4
  - Employment/recruitment
  - Employment policies
  - Policy and procedure
  - Pay change request
  - Separations

Chris Shepherd, HR Assistant  x3-2630  tshepherd
  - Employee transactions
  - All Electronic Approval (EPAF) questions

Veronique Klimonda, Benefits Administrator  x3-2603  vklimond
Barbara Merritt, Benefits Administrator  x3-4130  bmerritt
Nati Sullivan, Benefits Administrator  x3-3657  nsulliv
  - Health Insurance Benefits
  - Retirement
  - Leaves of Absence
  - VSDP
  - FMLA
Affiliates are individuals who are affiliated with the university in some way, but are not paid for their services. By completing an Affiliate Faculty Appointment form and entering an Ez-EPAF through BTS for the individual, departments are able to supply these individuals with access to email, the library, and a parking pass.

To process an affiliate, complete the Affiliate Faculty Appointment form, have it signed, send to the CHSS HR and Finance office and enter the electronic approval (Ez-EPAF). Once the transaction has been approved, the affiliate status is activated. **It is important to complete both the Affiliate Faculty Appointment form and the Ez-EPAF.** The Affiliate Faculty Appointment form can be found on the CHSS website at [http://chss.gmu.edu/staff/forms](http://chss.gmu.edu/staff/forms).

If the affiliate will be teaching or interacting with students on a regular basis (but are not paid for their services) an Affiliate offer letter, Affiliate Faculty Appointment form and copy of their CV must be signed by the Department Chair and emailed to provppm@gmu.edu. Once the Provost office has approved and signed the document, the packet will be emailed back to the department for the affiliate signature. The packet is then scanned and emailed Shirley Steppe; ssteppe2@gmu.edu and an Ez-EPAF for an affiliate teaching position is submitted.

If the affiliate is a foreign national and does not have paperwork on file at OIPS, have that individual contact OIPS (993-2970) to have a temporary ID number generated. Use that number to enter the affiliate into Banner and forward a copy of the Affiliate Faculty Appointment form to OIPS.
• Recruitment ads for Instructional, Research, and Administrative/Professional faculty positions must be processed through eWork. Candidates applying for these positions must complete an electronic on-line application and fill out the demographic/equity information.

• Depending on the hiring department’s preference, supporting materials such as CVs, letters of application, writing samples, etc., can be submitted by applicants either electronically in eWork or by mailing hard copies directly to the department.

• Hiring managers should update eWork as the hiring process progresses. This allows Equity to follow the hiring process and monitor EEO compliance.

• The final stage of the recruiting and hiring process (offer letter, approval of terms by dean, Provost and Equity) is done in hard copy paperwork. The Faculty Hiring Process Checklist, which outlines the faculty hiring process, can be found on the Office of the Provost website at http://provost.gmu.edu/geninfo.html.
A faculty hiring packet consists of the following documents:

1) Draft Letter of Offer (including Request for Information form and Attachment A)
2) Faculty Hiring Proposal
3) Candidate’s CV/Resume

**THE FACULTY HIRING PACKET**

**Offer Letter**

- When preparing a draft offer letter, make sure that the most current offer letter template is used. Offer letter templates can be found on the Office of the Provost website at [http://www.gmu.edu/facstaff/offer-letter/intro.html](http://www.gmu.edu/facstaff/offer-letter/intro.html). Note that the current offer letter templates include the Request for Information form and Attachment A (Faculty Terms and Conditions of Employment). Ensure that candidates initial and return all pages of the offer letter (including Attachment A).

- Include any extra terms of the contract in the Other Terms section of the letter. Examples of such terms are teaching load, moving cost allocations (be sure to specify that relocation expenditures must be in compliance with state guidelines), special funding arrangements or expectations, standard background check notification, etc.

- Insert the following clause in offer letters to 12-month faculty: “All 12-month faculty must use all accrued annual leave prior to separation from the university. There will be no payout for unused annual leave at the end of your employment.”

- If the terms of a contract involve the use of funds that the Dean’s Office and/or the Provost Office will provide, that information should be documented on the Worksheet for Start-up Commitments for New Faculty and submitted with the faculty hiring packet.

- For sample contract language to use in offer letters with specific or special circumstances, see page 6.
Faculty Hiring Proposal
The Faculty Hiring Proposal form should be included in the faculty hiring packet and can be found on the Office of the Provost website. Note: If the salary of an approved contract changes due to negotiations after the original paperwork has been submitted, an amended copy of the Faculty Hiring Proposal form should be sent to the CHSS Finance and HR office.

*****************
When the Faculty Hiring Packet is complete and the Department Chair has signed-off on it, submit the packet to the CHSS Finance and HR Office for final approval and processing. The hiring department will be contacted by the Office of the Provost when the offer letter has been approved and can be sent to the candidate.

Note: When the original offer letter is returned to the hiring department by the candidate with an acceptance signature, along with the Request for Information form, send the original letter and the Request for Information form to the CHSS Finance and HR Office.

Original Transcripts (full time faculty)
A transcript showing the highest degree earned is required for all faculty. The original transcript should be received by the Provost Office before the first day of employment.

When Candidates Decline Offers
When a candidate declines an offer made by the hiring department, notify the CHSS Finance and HR office immediately. If possible, specify the reason(s) that the candidate gave for declining the offer (e.g., salary, benefits, personal reasons, etc.).
TIMING TERMINAL DEGREE COMPLETION

Use the standard language that is provided in the Tenure Track Offer Letter Template.

APPLYING FOR TENURE EARLY

“As you have already served XX years in a tenure-eligible position at XXX University(s), you may, at your option, apply for tenure earlier than our normal six-year timeframe.”

TENURE TRACK HIRE STARTING WORK IN SPRING SEMESTER (OFF CYCLE)

“This is a 3 ½ year continuous appointment. Because you are being hired off the Tenure Track cycle, your initial appointment will be a Term appointment (effective January 10, 2011 through May 24, 2011). Upon completion of the Term appointment, you will be appointed to an initial three-year, Tenure Track/Probationary appointment (effective August 25, 2011 through May 24, 2014, a 9 month appointment).

The terms of the offer are as follows:

Term: January 10, 2011 through May 24, 2011, Fixed Term appointment
     August 25, 2011 through May 24, 2014, Tenure Track Probationary appointment
     (9-month appointment)
Salary: $52,500 per year
        (January 10, 2011 through May 24, 2011 salary will be $26,250)"
## SIGNATURE AUTHORITY FOR EMPLOYMENT CONTRACTS

### Types of Contracts

<table>
<thead>
<tr>
<th>Contract Type</th>
<th>Authorized Signature</th>
</tr>
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<tbody>
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<td>Tenured Faculty</td>
<td>President and Provost</td>
</tr>
<tr>
<td>Tenure Track Faculty</td>
<td>Provost</td>
</tr>
<tr>
<td>Term Faculty (single-year contracts)</td>
<td>Department Chair</td>
</tr>
<tr>
<td>Term Faculty (multi-year contracts up to 3 years)</td>
<td>Provost</td>
</tr>
<tr>
<td>Term Faculty (multi-year contracts up to 5 years)</td>
<td>President and Provost</td>
</tr>
<tr>
<td>Administrative Faculty</td>
<td>Provost</td>
</tr>
<tr>
<td>Postdoctoral Research Fellows (term not to exceed 1 year)</td>
<td>Department Chair</td>
</tr>
<tr>
<td>Center/Program Directors (term not to exceed 1 year)</td>
<td>Dean</td>
</tr>
<tr>
<td>Adjunct Faculty (term not to exceed 1 semester)</td>
<td>Department Chair</td>
</tr>
<tr>
<td>Graduate Teaching Assistants (term not to exceed 1 year)</td>
<td>Department Chair</td>
</tr>
<tr>
<td>Graduate Research Assistants (term not to exceed 1 year)</td>
<td>Department Chair</td>
</tr>
<tr>
<td>Graduate Lecturers (term not to exceed 1 semester)</td>
<td>Department Chair</td>
</tr>
<tr>
<td>Faculty Overload</td>
<td>Department Chair</td>
</tr>
</tbody>
</table>
**CRIMINAL BACKGROUND CHECKS**

Beginning June 25, 2012, Mason requires a standard background check for all new salaried faculty and staff as a condition of hire. Employees transferring into a new position will also be subject to a background check.

- For Classified hires, eWork will initiate the background check automatically at the time the position has moved into a “Filled” status.

- For Faculty hires, the department must send an email to HR Background Check (bkground@gmu.edu) with the following information:
  
  Applicant’s name
  Applicant’s Email Address
  Department
  Department Contact Person

**POSITION MAINTENANCE FORMS**

- It is necessary to complete a Position Maintenance Form in order to establish a new position and obtain a position number for Faculty, Administrative Faculty and Classified positions. The Position Maintenance Form can be found on the Office of Budget and Planning website at [http://budget.gmu.edu/posmaintform.doc](http://budget.gmu.edu/posmaintform.doc).

- The Department completes a Position Maintenance Form for **grant funded** and **classified positions**. The CHSS Finance and HR office completes the form for instructional faculty.

- Position Maintenance Forms for Administrative Faculty and Classified positions must also have a position description or Employee Work Profile attached.
• Once the Position Maintenance Form is completed, fax or mail it, along with the position description if applicable, to the CHSS Finance and HR office. A new position number will be assigned by the Budget Office and the department will be notified within 2 days. Note: if the position is grant funded, it may take longer than 2 days to receive the newly assigned position number.

• The Position Maintenance Form is also used to document permanent budget changes such as FTE changes, conversion of positions and abolition of positions.

The following types of academic/educational leave are available to faculty:

- Educational Leave With Full or Partial Pay – usually one semester to a year in length
- Educational Leave Without Pay – usually one semester to a year in length
- Tenure-Track Leave – one semester in length (paid)
- Faculty Study Leave – one semester (paid) to a year (partially paid) in length

Benefits while on leave vary, depending upon the type of leave taken (see the chart on page 9 for an explanation of faculty benefits while on leave). The following are the procedures to follow when faculty request academic/educational leave:

**Educational Leave – With or Without Pay**

• Faculty member submits a written request to take leave to the Department Chair.
• If approved by Department Chair, the request is forwarded to the Dean’s Office for approval.
• CHSS Finance and HR office formally requests leave in writing to Provost, and the Provost Office will send a written response to the faculty member.
• When leave is approved, an HR Transaction Form is completed by the Department putting the faculty member on leave.
• Upon faculty member’s return from leave, an HR Transaction Form is completed by the Department bringing him/her back to regular assignment.

**Tenure-Track Leave**

• Faculty member submits Tenure-Track Leave Request for Approval form to Department Chair.
• If approved by Department Chair, request is forwarded to the Dean’s Office for approval.
• CHSS Finance and HR office forwards request to Provost Office. The faculty member and all approvers receive a copy of the signed form from the Provost Office.
• When leave is approved, an HR Transaction Form is completed by the Department putting the faculty member on leave.
• Upon faculty member’s return from leave, an HR Transaction Form is completed by the Department bringing him/her back to regular assignment.

Faculty Study Leave
• Faculty member submits Study Leave application by deadline, following instructions per Provost website
• Faculty member is notified by the Provost Office that he/she is awarded the leave.
• Faculty member must choose if leave will be taken in one or two semesters. If a two semester leave (at half pay) is chosen, the faculty member is advised to contact Human Resources regarding possible benefits implications.
• Department fills out an HR Transaction Form putting the faculty member on leave.
• Upon faculty member’s return from leave, an HR Transaction Form is completed by the Department bringing him/her back to regular assignment.

Contact the CHSS Finance and HR office with any questions regarding Faculty Leave.

<table>
<thead>
<tr>
<th>FACULTY BENEFITS WHILE ON LEAVE WITHOUT PAY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personal</strong></td>
</tr>
<tr>
<td><strong>Illness</strong></td>
</tr>
<tr>
<td><strong>Educational</strong></td>
</tr>
<tr>
<td><strong>Agency Convenience</strong></td>
</tr>
<tr>
<td><strong>Military</strong></td>
</tr>
</tbody>
</table>
Educational Leave  Coverage may continue 24 months; the employer pays its contribution if the employee pays based on full salary. If less than half full contribution, the employer makes no contribution; no VRS service credit is earned; service credit can be purchased upon return.

Faculty Study Leave  Coverage may continue for the duration of the leave; the employer pays its contribution based on full salary. *Call your benefits administrator for details. Two Semesters Half Pay. Awarded Upon Committee Recommendation

Military Leave  Coverage may continue 24 months; the employer pays its contribution if the employee pays based on full salary. If less than half full contribution, the employer makes no contribution; no VRS service credit is earned; service credit can be purchased upon return.

• All classified positions must be recruited for using the eWork recruitment process.

• No formal recruitment is necessary for a wage positions.

• For more detailed information about the recruitment process, reference the Classified Hiring Guide on the Human Resources website at http://hr.gmu.edu/eWork/. Contact the CHSS Finance and HR office with any questions regarding the classified and wage recruitment proces
HIRING NON-IMMIGRANT EMPLOYEES

- Prospective employees holding Green Cards do not need to contact the Office of International Programs & Services (OIPS).
- Prospective employees holding a Non-Immigrant Visa should contact OIPS as soon as practical.
- Employees who hold a social security card that reads “For INS Purposes Only” must contact OIPS.
- For more detailed information about hiring international employees, refer to the OIPS website at http://www2.gmu.edu/dpt/unilife/oips/.

ONBOARDING/ HIRING PROCESS for NON-BENEFITTED EMPLOYEES

MasonOnBoard is the onboarding system for all Mason new hires. Benefited employees are processed centrally by HR and non-benefited by their associated department. Are you responsible for hiring non-benefitted employees in your department? If so, then you probably need access to Mason Onboard. Training sessions are offered every other month based on demand. To attend an upcoming training session, please send an email to hr@gmu.edu.

OnBoarding packets need to be created:

- If the new hire has never worked here before. Check the NBJLST screen in Banner for possible work history.
- If an employee has worked here before, but has a break in service of one year or more to the date, then a new hire packet needs to be created.
- A Re-hire packet is optional if they have worked here continuously and/or have less than one year of break in service.

MasonOnBoard

Submitting a Packet
Please visit masononboard.gmu.edu to log-in and submit a hiring packet for the employee.

Log-in
1. Enter 15114 as the employer ID and continue.
2. Enter your user ID, which should be your Mason email address without the @gmu.edu.
3. Enter your PIN

Creating a Packet
4. After you have logged in, you will come to the “Create Packet” screen. You do NOT need to enter the SSN, just click “Continue”

5. Enter the Mandatory Personal Data where * is shown.

   - Login ID *
   - Auto Generate

   **Personal Data**

   SSN Not Required:
   - First Name *
   - Middle Initial
   - Last Name *
   - Street Address
   - Apt/Suite#
   - Zip Code
   - City
   - State
   - Telephone Number *
   - E-mail Address *
   - Confirm E-mail *

   **Job Data**

   - Start Date (mm/dd/yyyy) *
   - Location *
   - Position *
   - Hire Type *

   **Additional Job Data**

   - Background Check Package *
   - GW (Optional)

6. Enter the Mandatory Job Data
   a. Start Date
   b. Location - GMU
   c. Position – GMU
   d. Hire type
   i. **New Hire** – All hiring paperwork including I-9
   ii. **Rehire** – All hiring paperwork without I-9 (Only use the Rehire option, if the current hire has a break in service less than 1 year)
e. Background Check Package – for more information, visit http://hr.gmu.edu/emp_relations/cbc/

7. Select “Create Hire Packet”

**Follow-up**
Once the employee’s packet has been created, the employee will receive an email to complete their paperwork. Once they have started the personal information page, you can look up the packet and use the information to query or complete a SPAIDEN record.

*Please note: OnBoarding packets must be completed within three business days of the first day of employment. If you enter the first date of employment as Oct. 1 (Sunday) on the OnBoarding packet, that means that the employee must complete all sections of the packet and the second section of the I-9 by Wed., Oct. 4. If no effort has been made to complete the OnBoarding packet by that date, the packet will be cancelled and will need to be re-submitted.

It is highly recommended that the start date of employment allow enough time for the recruit to access and complete the OnBoarding packet prior to starting work. If there are extenuating circumstances, please contact Deborah Gupta (dgupta5@gmu.edu); HR Consultant and OnBoarding Administrator.

**Remote Employees**
If an employee has been hired to work at a remote or off-site location and/or is not physically available on campus to present the document(s) in person to verify identity and employment authorization, the employee will need to have the Form I-9 Section 2 completed by an authorized agent on behalf of George Mason University. For remote employees, it is essential that the department start the process well in advance of the employee’s first work date. We usually recommend at least 2 weeks in order to provide the employee ample time to locate an Authorized Agent, schedule an appointment, complete the remote I-9 and mail the completed forms and document copies to HR.

**To Begin the Process:**
Submit a MasonOnboard packet and contact HR to provide them with the following information:

- A completed Remote Hire Notice Form
- The employees name
- G# (if assigned)
- First work date
- Position type
• Zip code (used to locate an authorized agent in their area)
• Email address and phone number

HR & Payroll will then facilitate the remote I-9 process with the employee and send them all necessary forms to complete.

The process is only completed when the following are received by HR & Payroll:
1) employee’s completed original Form I-9 2) Remote Hire Notice form 3) Authorized Agent form and 4) document copies. It is the department’s responsibility to follow-up and ensure that the remote I-9 is completed and received by HR & Payroll within the three day federal requirement. The department will be notified once the process is completed.

Faculty Separation

• Faculty separating at the end of the Fall semester will have a separation date of January 9. Faculty separating at the end of the Spring semester will have a separation date of May 24. Notify the CHSS Finance and HR office as soon as notice is received.

• Complete a Faculty Separation Form. Submit the form, along with a letter of resignation, to the CHSS Finance and HR office.

• Communicate to 9 month faculty who separate at the end of the spring semester that the summer healthcare continuation option is available.

• Complete the Employee Separation Checklist and Employee Separation Property Clearance Checklist.

Classified Separation

• Complete a Classified Separation Form. Submit the form, along with a letter of resignation, to the CHSS Finance and HR office.

• Complete the Employee Separation Checklist and Employee Separation Property Clearance Checklist.
Updated Separation Forms can be found on the HR & Payroll website at http://hr.gmu.edu/forms/.

This checklist is provided to help aid the faculty hiring process for each unit/department.

<table>
<thead>
<tr>
<th>Check when Completed</th>
<th>What is Needed</th>
<th>All faculty recruit actions (for instructional, research, and admin/prof) must be initiated via the eWork system at <a href="http://jobs.gmu.edu/hr">http://jobs.gmu.edu/hr</a>. Once you have selected your finalist...</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>□ a. Complete a <strong>Faculty Hiring Proposal</strong> form on the selected candidate.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>□ b. Attach a copy of the candidate’s CV/resume, draft offer letter*, and <strong>Request for Information</strong> form.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>*Offer letter templates can be found at: <a href="http://www.gmu.edu/facstaff/offer-letter/intro.html">http://www.gmu.edu/facstaff/offer-letter/intro.html</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td>□ c. Submit hiring packet to CHSS Finance and HR Office.</td>
</tr>
<tr>
<td></td>
<td><strong>Prepare the Hiring Proposal Packet for</strong> the selected candidate.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>□ Submit the Hiring Proposal Packet to the CHSS Finance and HR Office, MSN 3A3.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Once the Provost Office or appropriate VP and the Equity Office approve the proposal packet, the contact name identified on the Faculty Hiring Proposal will be notified by the Provost Office that the offer can be formally made to the candidate. <strong>The Request for Information sheet should be part of the offer letter when sent to the candidate.</strong></td>
</tr>
<tr>
<td></td>
<td>If the offer is declined (return to eWork and mark appropriate box)</td>
<td>Notify CHSS Finance and HR that the offer was declined. Begin this process again for the next acceptable candidate.</td>
</tr>
</tbody>
</table>

[Human Resources] Page 16
If the offer is accepted, submit the Original Signed Offer Letter and Request for Information sheet to the CHSS Finance and HR Office, MSN 3A3.

Submit the offer letter with original signatures and the Request for Information sheet to CHSS Finance and HR Office.

*** If changes were made after approval had been granted, please submit a revised version of the Faculty Hiring Proposal form with the signed offer letter. Indicate revision by marking the appropriate block and state in the notes section what the changes were. If significant changes were made, please submit the form through the appropriate dean/director for approval.

*** The Provost’s Office will release the completed hiring packet to Human Resources once all aforementioned documents are received.

Faculty Transcript

A transcript showing the highest degree earned is required for all faculty. This should be received by the Provost Office prior to the first day of employment.

Research Titles

Titles personnel on such appointments may hold are:

<table>
<thead>
<tr>
<th>GMU Local Titles:</th>
<th>State Title Equivalent:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research Associate</td>
<td>Research Lecturer (01041); Research Assistant Instructor (01042); Research Instructor (01043)</td>
</tr>
<tr>
<td>Research Assistant Professor</td>
<td>Research Assistant Professor (01044)</td>
</tr>
<tr>
<td>Research Associate Professor</td>
<td>Research Associate Professor (01045)</td>
</tr>
<tr>
<td>Research Professor</td>
<td>Research Professor (01046)</td>
</tr>
</tbody>
</table>

Normal qualifications for the categories are as follows:

**Research Associate:** At least a Bachelor's degree and 3 years experience, or a Master's degree and either experience, further education, or training appropriate to the specific sponsored research/instruction/service program need. Individuals in this category may not serve as principal investigators on grants and contracts.

**Research Assistant Professor:** At least a Bachelor's degree and 7 years experience, or a Ph.D. or other terminal degree. Individuals in this category may be involved in sponsored research, sponsored instruction, or sponsored service activities. Individuals in this category may serve as principal investigators on grants and contracts.
Postdoctoral Research Fellows shall be Research Assistant Professors and shall additionally be classified as postdoctoral fellows in the Human Resource system. Postdoctoral Research Fellows may serve as principal investigators on grants and contracts with the approval of the appropriate Dean or Institute Director.

**Research Associate Professor:** Master's degree in a field of research appropriate to the specific sponsored research/instruction/service program needs and 7 years of relevant experience or Ph.D. or other terminal degree and 3 years experience. Individuals in this category may serve as principal investigators on grants and contracts.

**Research Professor:** At least a Ph.D. or other terminal degree and 7 years experience in a field of research appropriate to the specific sponsored research program needs and management and program development experience. Substantial professional contributions are also necessary for this rank. Individuals in this category may serve as principal investigator on grants and contracts.

*These titles are in accordance with the Governor's Consolidated Salary Authorization for Faculty Positions in Institutions of Higher Education, and are used for statewide classification and payroll coding purposes only.

Last approved by David W. Rossell, Ph.D., March 10, 2006
The complete policy and forms are available at [http://fiscal.gmu.edu](http://fiscal.gmu.edu)

All events classified as business functions, student academic functions, and internal training functions (including reimbursements to faculty and staff) need the signature of the approving official in the CHSS finance office if state money is being used.

Submit Food and Beverage Authorizations prior to event.

- Complete vendor/payee information, department and account information
- Date, time, location of event, # of persons attending
- Check event type/function
  - **Business Function**: Meetings with outside parties that involve bona fide business discussions, meals with candidates.
  - **Student Academic Function**: Events that contribute to the academic mission of the university; enhance student life or experience. Current and prospective students are the primary beneficiaries.
  - **Student Club Function**: Functions held by student organizations are funded through the umbrella process.
  - **Internal Training**: Formal training that lasts all day and continues through the meal period. Only beverages allowed at half day training sessions.
  - **Other internal functions**: University-recognized events. Require approval from Chief of Staff, Senior Vice President or Provost.

- Attach list of attendees. Required for all functions except student clubs. The list attendees must include the name and organizational affiliation of each attendee. If a list is impractical to provide, a written explanation is required.
- Attach Sodexho food order, eVA, vendor invoice, or itemized receipts (reimbursement only)
- State purpose of event, be specific.
- Obtain required signatures and forward to CHSS finance office for approving official’s signature.

Please consult the Food and Beverages procedural manual for more information or contact Shirley Steppe ([ssteppe2@gmu.edu](mailto:ssteppe2@gmu.edu)) if you have questions about a function you are planning.
REIMBURSEMENTS

Complete a Food and Beverage Authorization Form, attach list of attendees and itemized original receipts. A payee can be reimbursed for multiple events (such as candidate meals) using one Food and Beverage Authorization form. If there are more than 3 receipts, please provide a summary sheet listing the details for each event separately.

**Do not send payment request forms to request payment for food and beverage purchases.**

The following functions are exempt from Policy 2102 requirements:

- Events or functions at which food and beverage expenses are paid solely from participant fees
- Residence hall events that cost less than $100 per event
- Intercollegiate Athletics (ICA) pre/post game meals within per diem maximums related to home competitions
- Student-focused events that cost less than $2,000.00 per event that are within per diem maximums and primarily benefit Mason prospective students, students and student athletes
- Meals within per diem maximums provided to students who are required to be on campus when Mason meal plans are not available
- Meals within per diem maximums provided to performers and other visitors in conjunction with contractual requirements.

FOOD AND BEVERAGE RATES

The maximum cost per person for food and beverages for the Washington Metropolitan Area including Fairfax and Arlington Counties are: Breakfast - $24, lunch - $25.50, dinner - $46.50. These individual meal rates include all service fees, taxes and gratuities. Business meals that are held outside the Washington, DC area are subject to the meal allowance for that area.

REstrictions

- No food or beverages at internal planning, regularly scheduled or routine meetings.
- No food or beverages for goodwill or morale.
- No food or beverages provided as a perquisite (“perk”).
- No alcohol. If alcohol was served, the price of the alcohol should be subtracted, along with the appropriate amount of tax and tip. If the receipt is not itemized, the payee must include a signed statement verifying that no alcohol was served.
Please use the online catering system to place any order within four days of your event. This system keeps track of all previous orders and lets you repeat them. You can check the status of a current order and make changes up to three days prior to the event. Approval takes place electronically by choosing Shirley Steppe as the approver. This serves as the Food and Beverage Authorization form. Please give the event a distinct name, list the organization number, choose the type of function, and state the purpose of the event. There is enough space under “purpose” to add the names of attendees or a statement that a list is not practical. If you cannot add the attendees on the electronic order form, please send the list via e-mail or campus mail to Shirley Steppe at the time you place the order. If you choose not to use the online catering system, please contact the catering office at 993-3302 to plan your event. The catering office will e-mail a contract/order confirmation to the department to review, and the request for approval of the order is sent electronically to the senior approving official (Shirley Steppe).

Any catered event using state funds must use a caterer that is registered with Virginia’s eVA Purchasing System, and payments for catering services will be made through eVA. The Office of University Services maintains a list of approved caterers.

For events less than $2,000: complete an eVA order, a Food and Beverage Authorization Form, and a list of attendees. Enter the eVA order number on the F&B form in the “Department Information” section, obtain all required signatures, and send all to Accounts Payable.

For events greater than $2,000: prepare an eVA order and a Food and Beverage Authorization Form. The approved Food and Beverage Form and a list of attendees may be scanned and attached to the eVA order. A Purchasing Office Buyer will issue the order to the vendor.

Pizza Orders: Domino’s and Papa John’s are registered eVA vendors. These vendors offer discounted GMU pricing. You may place your order by phone to determine delivery date and time, and total cost, including tip. Prepare the Food and Beverage Authorization Form, attendee list and a non-catalog order in eVA.

Note: The Purchasing Charge Card may be used for purchase of Food and Beverage items at grocery (Giant, Safeway, etc.) or general merchandise stores that carry food (Wal-Mart, Target, etc.) without the submission of a P-card waiver. Dedicated food establishments (restaurants, carry-out, etc.) may still require a lift based on credit card merchants restrictions. A P-card Food and Beverage waiver should be submitted to the P-card office 2 days prior to the purchase. Comments in Bank of America Works reflecting the type of purchase along with
receipts are required. **Confirming orders** are required unless the purchase is made over-the-counter (in-person at the establishment)

Food and Beverage Policy functions: The P-card may not be used to purchase food and beverages for events or functions under the Good and Beverage policy. Cardholders may request a temporary lift to allow food and beverage to be purchased with the P-card. A P-card Food and Beverage Waiver may be submitted to the P-card office for approval. If a waiver is granted, then the completed F&B form, attendee list, applicable receipts and comments in Bank of America Works are required. Confirming orders are required unless the purchase is made over-the-counter (in person at the establishment).

For detailed food and beverage policy and procedures please see the Food and Beverages Expenditures Guide on the fiscal services web page.
TRAVEL POLICY BASICS
For the complete policy and forms please refer to the Travel Office page on the Fiscal Services website http://fiscal.gmu.edu

TRAVEL REQUEST SYSTEM (TRS) All Travel Authorizations and Reimbursements (except for team travel) must be processed through Mason’s electronic travel resource, the Travel Request System (TRS) https://travel.gmu.edu/. Mileage, per diem rates and lodging maximums are embedded in the system, and calculations are performed based on travel dates and location(s) entered. The TRS design includes a delegate feature in which a traveler, department chair or supervisor may designate a Mason staff member to complete electronic Travel Authorizations and Reimbursements on behalf of others. Additional information is available on the Fiscal Services website. The TRS is independent of Banner Finance. A Quick Guide is available in Appendix E and at TRS Quick Guide.

ADVANCE APPROVALS
All travel requires advance approval. Travelers must submit Travel Authorizations through the online TRS system prior to the travel date if:
- the travel involves commercial air transportation
- or the cost is expected to exceed $500
- or lodging cost is above basic rates.
- Travel outside the contiguous United States.

The traveler’s supervisor may approve other trips orally.

Some travel may require additional advance approval.
- Lodging at rates in excess of the 150% premium
- Travel involving more than three employees from the university
- Departments intending to invite residents of foreign countries to travel at the university’s expense must arrange with the Office of International Programs and Services (OIPS) • Travel to a comprehensively embargoed country (e.g. Cuba, Iran, North Korea, Sudan and Syria) OR To a militarily embargoed country such as China or Afghanistan (complete list of these countries available at: http://pmddtc.state.gov/embargoed_countries/index.html) for a traveler who works with International Traffic in Arms Regulations (ITAR) data.

Requires advance approval from the Office of Research Integrity and Assurance (ORIA).

Complete all personal and trip information

Lodging and Meal Planning:
- When using the online Travel Request System current lodging rates and per diem rates for meals and incidental expenses are automatically calculated. For planning purposes rates can be obtained from the Travel Office page on the Fiscal Services website http://fiscal.gmu.edu
• **Written justification is necessary for any expense exceeding the basic lodging rate for that destination.**

• Direct bill charges (for example, when candidates are hosted at a local hotel) are considered travel expenditures and need to be included on the travel authorization form.

**Obtain Approvals:**

**All travel must be submitted through the TRS system.**

The **Supervisor's NetID** field should be your department chair or direct supervisor.

- If you know that your direct line Supervisor will be out on leave, please enter their Proxy's NetID in this field.
- **If the Travel is for a Department Chair or center Director,** the Supervisor’s Netld field should be changed to kdight.

When entering the **Fund/Org Information**, all authorized signers will appear in a drop down list. Select your department chair. If you are not sure who the appropriate person would be, please check with your Office Manager or Financial Manager.

- Note that the system allows funding to be allocated between more than one funding source. It can be broken down by either percentage of total or by dollar amount (If the reimbursed amount will be a flat maximum, enter that amount in the dollar cell.)
- If charge is for Faculty Start Up, Org 103404, select Kdight as Approver, and enter SSTEPPE2 as Optional Approver below Fund/Org Information.
- If you are a department chair, enter kdight as the supervisor NetID, and select Kim Dight as Approver for the Org.

Be sure that you continue through to the end of the Authorization or Reimbursement, after the COMMENTS section, and **CLICK THE SUBMIT BUTTON.** Once you submit for approval, the traveler or designee will receive an email confirming that it was submitted for approval. You will also receive an email when the document has completed the approval.

Travel Reimbursements are now done electronically. At the end of the reimbursement process in the TRS system, you should attach scanned copies of all required receipts. Make sure to submit in .pdf format. It is advised that the system has a size limit for files as well as a required naming format. Check the Travel website for further details.

**International Travel:**

International travel requires an additional level of approval. It is highly recommended that you submit Travel Authorizations through the TRS system as soon as you are aware of the trip. The Travel office requests two months prior to travel.

All International travel for Department Chairs or funding charged to Dean’s Start-up accounts needs approval from the Dean’s office. Select Kim Dight (kdight) as the Supervisor. For travel being charged to Org. 103404, you would choose Shirley Steppe (ssteppe2) as the Fund/Org approver.
TRAVEL DIRECT DEPOSIT OF REIMBURSEMENT PROGRAM

Required for anyone who travels more than twice a year. However, any traveler can apply. The application form, EDI (Direct Deposit) Enrollment for State Employees, available online at [http://fiscal.gmu.edu/forms/Travel%20Forms/EDIenrollment.pdf](http://fiscal.gmu.edu/forms/Travel%20Forms/EDIenrollment.pdf), should be filled out and sent to Penny Smith in the Travel Office at mail stop 3G6. Travelers will be notified via e-mail by the Commonwealth of Virginia when the deposit has occurred.

CANDIDATE TRAVEL

A letter to inform candidates about George Mason University’s travel policies and procedures is available on the travel office web page. The requirements to reimburse faculty candidates are identical to the requirements related to routine George Mason University travel. Please include all travel cost on the travel authorization form including the expenses paid by the department directly (e.g. airfare or hotel).

LOCAL LODGING

Normally, employees may not be reimbursed for lodging within 25 miles of their work place. When special circumstances exist, Senior Approving Officials may authorize overnight lodging in the local area. The University has negotiated contracts with several hotels in the local area, including the Mason Inn. Departments are encouraged to make lodging arrangements for guests and candidates to obtain favorable rates and direct billing to the University. The most current list of hotels can be found on the [Travel Office](http://fiscal.gmu.edu/forms/Travel%20Forms/EDIenrollment.pdf) web page.

ENTERPRISE CAR RENTAL PROGRAM AND CHANGES TO MILEAGE REIMBURSEMENT

The Virginia Office of Fleet Management Services has partnered with Enterprise Rent-a-Car to provide short term rental cars for state agencies. This impacts reimbursement of mileage for trips more than 280 miles per day. It is important that travelers access the [Enterprise Trip Calculator](http://fiscal.gmu.edu/forms/Travel%20Forms/EDIenrollment.pdf) when planning a trip that involves more than 280 miles per day. In most cases the traveler will be reimbursed the cost of the Enterprise rental car and gas, or mileage at the fleet rate. The [travel web site](http://fiscal.gmu.edu/forms/Travel%20Forms/EDIenrollment.pdf) has detailed information on this new policy.

FLY AMERICA ACT RESTRICTIONS

The Fly America Act restricts foreign travel supported by federal funds to the use of a U.S. air carrier. All flights using federal funds should be made with a U.S. air carrier unless an exception has been approved by OSP in advance. To ensure that any connection in the foreign country is also with an American airline or partner, use a travel agency to make all arrangements and inform them of the requirement. Please contact [Mike Laskofski](http://fiscal.gmu.edu/forms/Travel%20Forms/EDIenrollment.pdf) at 993-4573 if you have any questions.
COMBINING BUSINESS AND PERSONAL TRAVEL
The traveler is required to price both the actual trip and the business-only portion of the trip on the
day that the airline ticket was purchased. A print out of the prices of both trips must be included
with the travel expense reimbursement voucher.
There is no standard moving and relocation provided to new hires. Any agreement to provide moving and relocation support should be clearly documented, including who agreed to pay for it (department, Dean or Provost).

The state guidelines for moving and relocation are located online at http://www.doa.virginia.gov/Admin_Services/CAPP/CAPP_Topics/20345.pdf. The documentation includes what moving and relocation expenses can and cannot be charged to the state, as well as the required forms and instructions for completing them.

**Eligibility**
To be eligible for moving and relocation reimbursement the employee’s relocation must meet all of the following conditions:

- The relocation must be at the request of the employing agency
- The distance between the employee’s new work location and the former residence must be at least 50 miles greater than the distance between the employee’s old work location and the former residence. The commute has to increase by 50 miles.
- The employee must remain in satisfactory full-time employment for at least one year.

Moving and relocation commitments to new faculty must adhere to the maximum dollar amounts dictated in the state guidelines. In many instances, the amount in the contract letter is less than the maximum allowed by the state. In these cases, the faculty member will not be reimbursed for any expenses above and beyond the amount stipulated in the contract letter. The Human Resources office and Payroll will oversee the disbursement of the lump sum for relocation compensation.

If you have any questions concerning moving and relocation, please contact Shirley Steppe at 3-5457 or ssteppe2@gmu.edu.
In addition, procedures, a moving and relocation fact sheet, and forms can also be found on the CHSS Finance and HR web page.
<table>
<thead>
<tr>
<th>CONTENTS – Ez-EPAF</th>
<th></th>
</tr>
</thead>
<tbody>
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</tr>
<tr>
<td>Appendix 3- Hrs. per Week/ Hrs. per Pay Period guides</td>
<td>24</td>
</tr>
</tbody>
</table>
NOTE:

- All Electronic Approvals will now be entered using EZ- EPAF in BTS.
- Verify that there is an existing record in SPAIDEN. If so, continue to EZ EPAF instructions on following page. If not, follow instructions below to verify there is no previous SPAIDEN entry.
- SPAIDEN, the secure Identification screen now replaces PPAIDEN
- If fields are not addressed in directions, leave blank.

FIRST ACTION BEFORE ENTERING EZ EPAF

- It is critical that you check to see if a person has a record in Banner for prevent duplicate records. Your first step will be to see if the employee already has a record in Banner. New employees may have records for several reasons, including if they attended Mason as a student. Please refer to the HR website, HR.gmu.edu ; Resources link , http://hr.gmu.edu/hrliaisons/docs/onBoardingAndEPAFManual.pdf for instructions on verifying a G# and setting up a SPAIDEN record. An EPAF cannot be submitted for any non-benefited employee until this in verified and completed.

**BANNER is always your official record of employment history.** BTS is a tool CHSS uses to track our financial transactions. Always verify employee information in Banner before submitting any record to BTS.
CREATING A SPAIDEN RECORD IN BANNER

SPAIDEN - Person Identification Screen
An employee must have a SPAIDEN record before an EPAF can be submitted for an employee. Most individuals will already have a SPAIDEN record and, by virtue, a G# in Banner. Before creating a G#, you must first search for the employee using Social Security Number and name. After the appropriate SPAIDEN record is identified, updated, and/or created, an EPAF can then be submitted for the assignment.

I. Search for a Banner Record G# using Social Security Number

1. Once you have logged into Banner, type SPAIDEN in the search box and click on “General Person Identification”.

2. Identify whether an employee already has a G# in the system by searching by Social Security Number, first.

   a. If the SSN populates a person record, verify that the name populated matches employee and it is not a mistyping of SSN. Review record for missing or incomplete information and continue to BEFORE BEGINNING AN EPAF.
II. Generate ID and evaluate potential matches

If a search for a Banner record using Social Security Number does not produce results, the GOAMTCH form will automatically populate.

1. Click

2. Click
STOP if you do not see “GENERATED” in the ID field and call an HR Assistant

3. Enter all of the employee’s information. (Do NOT create G#’s without a SSN and DOB, with the exception of International employees that may not have an SSN at that time)

4. SAVE to search for matches
   a. If no matches are found, you will be prompted with the message “No matches found, create as new?” Verify your input is accurate. Select “Yes” and jump to III. COMPLETE SPAIDEN RECORD FOR NEW PERSON
   b. If a potential match exists, a list of matches and potential matches will populate
5. Evaluate matches and potential matches
   a. Match is **true** if the following match:
      i. SSN and first name match
      ii. First name, Last name, and DOB

   b. Match is **inconclusive** if the above match criteria are not met, **despite** being a “match” in GOAMTC. Please contact an HR Assistant to assist if a match is inconclusive and **do not continue**.
i. Not enough information on existing record to conclude whether match. Matched only on name, other information exists.

ii. Evaluate potential matches for slight discrepancies in name, SSN, DOB, etc to evaluate whether existing record or your record is correct.
2. Either **Select ID** OR **Create New**
   a. If match is **CONCLUSIVE**, click **Select ID**, review record for missing or incomplete information and continue to **BEFORE BEGINNING AN EPAF**
   b. If match is **INCONCLUSIVE** and it has been VERIFIED as NOT BEING A MATCH with an HR Assistant, click **Create New** and continue to **III. COMPLETE SPAIDEN RECORD FOR NEW PERSON**

---

### III. Complete SPAIDEN record for new person

Once we have made sure the individual does not already have a Banner record by review in potential matches, we can complete the Banner record. It is highly recommended that you enter in as much information as possible in GOAMTCH as the information automatically populates into the new record.

1. By clicking **Create New** it will bring you back to the **SPAIDEN** record.
2. Click **Current Identification Tab**
3. Enter the following data under the **Current Identification** tab, without any punctuation:
   a. Last Name
   b. First Name
   c. Middle Name (if applicable)
   d. Prefix (ie Ms, Mr, Dr)
   e. Suffix (if applicable, ie Jr, II)
4. Leave other fields (Name Type, Preferred First Name, and Full Legal Name) blank
5. **Alternate Identification**
6. Click on the **Alternate Identification** tab to link the SSN to the G#. If the employee is International and does not have a SSN yet, please skip this step and move to **ADDRESS**.
7. Enter the following:
   a. Name Type: LGCY
   b. Change Type: ID
   c. **ID**: 9 digit SSN
5. **Alternate Identification**

6. Click on the *Alternate Identification* tab to link the SSN to the G#. If the employee is International and does not have a SSN yet, please skip this step and move to **ADDRESS**.

7. Enter the following:
   a. Name Type: LGCY
   b. Change Type: ID
   c. **ID**: 9 digit SSN

8. If you are unable to save due to an error – **STOP and call Human Resources**.
Address
Permanent Address

9. Click on the Address tab to enter the Permanent Address (PR) and enter the following:
   a. Enter the From Date as today. Leave the To Date blank.
   b. Enter “PR” (Permanent) in Address Type
   c. Enter the Address
   d. Street Line 1: Street Address with Apt or suite, if applicable
      e. ZIP or Postal Code: Enter the zip code. This will automatically populate the City and State.
   f. Enter the phone number

10. SAVE

<table>
<thead>
<tr>
<th>Current Identification</th>
<th>Alternate Identification</th>
<th>Address</th>
<th>Telephone</th>
<th>Biographical</th>
<th>E-mail</th>
<th>E</th>
</tr>
</thead>
</table>

ADDRESS INFORMATION

From Date 03/06/2018
To Date
Address Type PR
Sequence Number
Street Line 1 2425 Dogbone Way
Street Line 2
Street Line 3
City
State or Province
ZIP or Postal Code 22030

Mason Address

11. To add the Mason Office Address, click the down key on your keyboard to get a blank Address record and enter the following:
   a. Enter the From Date as today. Leave the To Date blank.
   b. Enter “GM” (Mason Office Address) in Address Type

12. Enter the Address
   a. Street Line 1: 4400 University Dr (all employees)
   b. Street line 2: 3 character mail stop (ex: 3C3)
   c. ZIP or Postal Code: Enter zip code 22030. This will automatically populate the City and State.
Enter the Mason phone number (no hyphens)

13. SAVE

**Biographical**

14. Click on the Biographical tab

15. Enter the following data:

   a. **Birth Date** (<Age> field will automatically populate)

   b. **SSN/SIN/TIN** – Enter Social Security Number

   NOTE: For those individuals waiting on permanent SSN numbers from the Social Security Administration, effective immediately, Hiring Departments should now use '000000000' instead of '999xxxxxx'(valid SSN). When using all “0”s you will receive a warning that the SSN is already assigned to another record. You may proceed by clicking “OK” on the warning screen.

   c. **Citizenship** – DO NOT USE “SP – Substantial Presence”

      (1) NI – Non-Immigrant

      (2) PR – Permanent Resident

      (3) US -- US Citizen

16. Do NOT enter Marital Status, Legacy, and Religion. This is part of the standard Banner package, but these fields are not maintained for Mason employees.

17. New Ethnicity and Race. Click to view the list of acceptable values.

18. If the employee has disclosed any US Military Veteran status, enter in **Veteran Category**. Check the box if the employee Discloses that they are a **Special Disabled Veteran**.

19. SKIP Confidential, Deceased, Veteran File Number

20. SAVE
**Email**
An email address does not need to be entered for the employee. A Mason email will be automatically generated for the employee once an EPAF has been submitted and it has been completely approved by ALL approvers. After the EPAF has been completely approved, ITS will establish his/her email within 24-48 hours.

**Emergency Contact**

21. Click on the **Emergency Contact** tab, if you have this information and enter the following:
   a. **Priority**: Enter Priority as 1; unless a number is already populated. In that case enter the next number in sequence
   
   b. **Relationship**: You can click on the option box next to Relationship to select associated code
   
   c. **Last Name**
   
   d. **First Name**
   
   e. **Address**: This will automatically populate as the employee’s permanent address. Please update if this is not accurate.
   
   f. **Telephone** (no hyphens)

<table>
<thead>
<tr>
<th>Current Identification</th>
<th>Alternate Identification</th>
<th>Address</th>
<th>Telephone</th>
<th>Biographical</th>
<th>E-mail</th>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Priority * 1
- Relationship [P Parent]
- Last Name * Kirk
- First Name * Megan
- Address Type [PR Permanent]
- Street Line 1 2425 Dogbone Way

22. **Save**

23. Click on the black X in the main toolbar to exit to the main menu.
Prior to entering a NEW Ez-EPAF, have the following information available.

1. Employee legal name and G# 
2. Org./Fund number paying for the position (verify position needed is set up on Org., grant or fund by checking Patriot Web; Employee Services Tab; Pooled positions Lookup query. [https://patriotweb.gmu.edu/pls/prod/twbkwbis.P_WWWLogin]
3. Labor category of employee. (ex: Faculty, Adjunct, Grad Assistant, Wage, Affiliate) *Be sure to verify the labor category in Banner. IF they say they are a student, verify how many credits they are registered for.
4. Salary amount or wage per hour.
5. Begin and end date for payment.( Refer to Pay Schedule Matrix pg. 11-12 )
6. If applicable, Course name, section number, CRN being taught or supported.
7. Wage, GR and GTA employees will need hours per day/hrs. per pay period. Positions supported by grants require the total anticipated salary for the period of employment be included in the Notes section.
8. Timesheet administrator name, G# and position number.
9. Labor being charged to a grant or fund requires that a guarantee Org. be provided in the Notes section of the Ez-EPAF if the begin and/or end date of the position is outside the period of performance for the grant.

A. Access BTS: bts.gmu.edu
B. If you do not have access contact: Shirley Steppe (ssteppe2@gmu.edu) Click on EZ-EPAF link at the bottom of the MENU on the left hand side.
C. Screen below should be visible. NEW tab will be highlighted.
D. Use the pull down menus to choose the Current Fiscal Year and Department.
E. Choose the employee name from the drop-down menu provided. Or enter the last name, first name or G# of the employee and click on “Find”. Select the employee from the choices and click on “Select”.

Note: If this is a new employee to GMU, use the “Find” feature the first time in Ez-EPAF.

F. Enter Fund/Org the labor is being charged to. Click on “Look-up and Continue.”
G. Choose the Appointment category for this position: Faculty (there are three faculty options), Classified Exempt, Adjunct, Grad. Assistant, Wage or Affiliate.

H. Choose the Pay Transaction: Ex. Misc. Pay, Student wage, etc. Then click on “Continue”.

Note: if the position number defaults (xxx99), please enter the needed number in the NOTES field. This may be a new project or grant and the position number has not been entered into BTS.

If you are hiring an adjunct, Admin Faculty, Faculty overload position, the next screen will require you to select the semester for the assignment. Then specify whether this will be a full or partial semester assignment.

Then choose the correct start and end dates for the assignment. Enter the salary in the Pay Matrix field.
Select the appropriate department for the course being taught. Then choose the course and section using the drop down fields provided.

For all other positions.

I. Enter a brief description of the pay (30 characters or less) Do not include special characters. If this is for a faculty teaching position, include Course name; section number; CRN number (separated by a space)

J. Enter hours per week/ hours per pay period, if applicable. Refer to Appendix 3 or 4 for acceptable entries.

K. Enter salary or hourly wage. Enter only numerical digits. EX: 1000 instead of 1,000.

L. Enter Payroll begin and end dates. If you are ending the position after the end of the current fiscal year, choose the “2 Years” option (radio button) in the Payroll Dates field. That will display a longer list of payroll date options.

M. For Faculty, Adjunct and Graduate Assistants: choose the appropriate Credit hours (FTE) for the position.

N. Enter any notes, special instructions that need to be included on the EPAF.

   Note: If you are hiring on a grant and the award ends prior to the end date of the assignment. OSP requires that you provide a guarantee org. for the labor to default to for the remainder of the assignment.

Click on “Save this EZ-EPAF”.

A new screen will display giving you an option of generating a contract (for those positions in which a contract /form is required) or starting another EZ-EPAF.
TERMINATING AN EXISTING EPAF

If the position that requires termination was originally entered into Banner directly, verify the position number and suffix for the termination. Then access BTS, Ez-EPAF and click on the New tab. Select the Fiscal Year in which the termination will occur. Continue as if entering a new Ez-EPAF choosing the correct person, appointment type and pay transaction of the original position. Then click on the box next to “End Existing Assignment”. Then click on Continue. Choose the termination date from the drop down menu or enter manually depending on the position type. Enter notes to indicate the reason for the termination, (graduated, left the University, starting new position) and the position number and suffix of the position you are terminating. Then click on “SAVE this Ez-EPAF”.

If the position that requires termination was originally entered into BTS Ez-EPAF.
Access the “Completed “Tab. Choose the Fiscal year the original EZ-EPAF was submitted. Locate the employee record matching the position number and suffix of the required termination. Click on the word “Terminate” that appears next to the employee name for that record.

A new box will appear with the BTS transaction number, and all notes from the original record displayed. Choose the needed termination date (Positions paying on the Semi –Monthly pay schedule must be terminated on the last day of a pay period). Click on SAVE.
The record for the termination will migrate back to the Submitted queue for Finance to process the termination in BTS.

All termination records will appear highlighted in the display fields for both the My Ez-EPAF and Completed tabs.
A. Access EZ-EPAF and click on “My Ez-EPAF’S”

B. Make sure to check the box, “Include all Funds/Orgs I am authorized for.”

C. Choose the status category you wish to view:

1. Submitted (status A) – this would be any Ez-EPAF’s you have just submitted to the Ez-EPAF system.

2. Received by Finance (status A B) – This will be used as a queue to hold any Ez-EPAF’s that may be missing information prior to input in Banner. Once that information is received, the Ez-EPAF status will be changed to “Entered into Banner”.

3. Entered into Banner (status ABC) – Shows all Ez-EPAF’s entered into Banner. Review Column “ID’ which displays the transaction number for BTS/Banner. Once your EPAF is approved and completed in Banner, the Ez-EPAF record will be moved to the “Completed tab.”
LOCATING COMPLETED Ez-EPAFS

A. Access Ez-EPAF application and click on the “Completed” Tab.
B. Choose the Fiscal Year the Ez-EPAF was submitted in.
C. Choose the Fund/Org. the charge was posted to. Sort by Fund/Org or Title and then choose the employee from the pull down menu. OR enter the G number and Last Name of the employee.
D. Click on “Find EPAF’s that Match this selection criteria” to begin query.
E. Scroll down the selections to the needed record.
CHSS & HR EPAF APPROVERS

FACULTY OVERLOADS
Irene Mills (imills2)

FACULTY SPECIAL PAYS
Kim Dight (kdight)

POSITIONS HIRED ON GRANTS
Janice Cohen (jcohen9)

PART TIME
Sarah Fink-Youngbar (sfinkyou)

GRADUATE ASSISTANTS AND GRADUATE LECTURERS
Sarah Fink-Youngbar (sfinkyou)

WAGE, STUDENT WAGE, WORK STUDY, MISC. PAYS
Sarah Fink-Youngbar (sfinkyou)

AFFILIATES
Sarah Fink-Youngbar (sfinkyou)

HR APPROVERS: SELECT FROM THE FOLLOWING APPROVERS
Your EAs will go into a pooled “HR Team1” box in Banner.
Anthony Cole (acole3)

Appendix 1
SEMI-MONTHLY PAY PERIODS

For: GRAs, GTAs, GLs, PT, Misc. Pays, Faculty and Classified Staff

To ensure that all requests and payment are processed in the timeliest and most accurate manner possible, all requests and supporting documents must be submitted to the appropriate office at least 6 business days prior to the end of each pay period. Please be reminded that all transactions require 2 to 6 levels of approval before they are applied to payroll.

2019 Semi-Monthly Pay Schedule

<table>
<thead>
<tr>
<th>Pay No</th>
<th>Pay Period Start Date</th>
<th>Pay Period End Date</th>
<th>Pay Date</th>
<th>EPAF Submission Date</th>
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<td>24-Dec-19</td>
<td>31-Dec-19</td>
<td>10-Dec-19</td>
</tr>
</tbody>
</table>

Semi-Monthly Pay Period Tips

First pay period in FY 2020: 06/10/2019- 06/24/2019 (SM 12)
Summer Term: 5/25 - 8/24, pay periods vary based on length of sessions
Fall Semester:
For GTAs, GRAs, GLs, and Faculty: 8/25 - 1/9, total 9 pay period, SM 17 - SM 1
For Adjuncts: 8/25 - 12/9, total 7 pay periods, SM 17 - SM 23
Spring Semester:
For GTAs, GRAs, GLs, and Faculty: 1/10 - 5/24, total 9 pay period, SM 2 - SM 10
For Adjuncts: 1/25 - 5/9, total 7 pay period, SM 3 – SM9

Appendix 2

For: Student Wages, Wages, and Work Study
To ensure that all requests and payment are processed in the timeliest and most accurate manner possible, all requests and supporting documents must be submitted to the appropriate office at least 6 business days prior to the end of each pay period.

<table>
<thead>
<tr>
<th>Pay No</th>
<th>PP Start Date</th>
<th>PP End Date</th>
<th>Check Date</th>
<th>EPAF Submission Date</th>
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<td>21-Dec-19</td>
<td>27-Dec-19</td>
<td>9-Dec-19</td>
</tr>
</tbody>
</table>
**Hours per week/ Hours per Pay requirements:**

**Semi-Monthly Assignments:**

**Adjunct and Graduate Lecturer: Fall, Spring and Summer**

Adjunct Position prefix: PO, FV

Adjunct Position prefix: SP, SF, PO, FV

Graduate Assistants prefix: GL

<table>
<thead>
<tr>
<th>Session</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Pays /Factors</th>
<th># credits</th>
<th>FTE</th>
<th>Hours per Day</th>
<th>Hours per Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall</td>
<td>08/25/YY</td>
<td>12/09/YY</td>
<td>7/7</td>
<td>0</td>
<td>0</td>
<td>1**</td>
<td>4.57**</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>.083</td>
<td>1*</td>
<td>6.86</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2</td>
<td>.166</td>
<td>1.27</td>
<td>13.71</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3</td>
<td>.25</td>
<td>1.90</td>
<td>20.57</td>
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<td></td>
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<td>.33</td>
<td>2.53</td>
<td>27.43</td>
</tr>
<tr>
<td>Spring</td>
<td>01/25/YY</td>
<td>05/09/YY</td>
<td>7/7</td>
<td>0</td>
<td>0</td>
<td>1**</td>
<td>4.57**</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td>.083</td>
<td>1*</td>
<td>6.86</td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
<td>2</td>
<td>.166</td>
<td>1.27</td>
<td>13.71</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3</td>
<td>.25</td>
<td>1.90</td>
<td>20.57</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4</td>
<td>.33</td>
<td>2.53</td>
<td>27.43</td>
</tr>
</tbody>
</table>

**Graduate Teaching Assistant: Fall and Spring:**

**Position prefix: GA**

<table>
<thead>
<tr>
<th>Hours Per Week (Not entered in the EPAF)</th>
<th>Hours Per Day (This field will be determined by the hours per pay)</th>
<th>Hours Per Pay (This field will determine hours per day)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>1</td>
<td>10.83</td>
</tr>
<tr>
<td>10</td>
<td>2</td>
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<tr>
<td>15</td>
<td>3</td>
<td>32.50</td>
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<tr>
<td>20</td>
<td>4</td>
<td>43.33</td>
</tr>
<tr>
<td>25</td>
<td>5</td>
<td>54.17</td>
</tr>
<tr>
<td>30</td>
<td>6</td>
<td>65.00</td>
</tr>
</tbody>
</table>
**Graduate Research:**

<table>
<thead>
<tr>
<th>Hours Per Week (Not entered in the EPAF)</th>
<th>Hours Per Day (This field will be determined by the hours per pay)</th>
<th>Hours Per Pay (This field will determine hours per day)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>1</td>
<td>10.83</td>
</tr>
<tr>
<td>10</td>
<td>2</td>
<td>21.67</td>
</tr>
<tr>
<td>15</td>
<td>3</td>
<td>32.50</td>
</tr>
<tr>
<td>20</td>
<td>4</td>
<td>43.33</td>
</tr>
<tr>
<td>25</td>
<td>5</td>
<td>54.17</td>
</tr>
<tr>
<td>30</td>
<td>6</td>
<td>65.00</td>
</tr>
</tbody>
</table>

**Bi-Weekly Assignments:**

*Wage Assignments: Non-Student wage (WG), Work Study (WS) and Student Wage (SW)*:

<table>
<thead>
<tr>
<th>Hours Per Week (Not entered in the EPAF)</th>
<th>Hours Per Day (This field will be determined by the hours per pay)</th>
<th>Hours Per Pay (This field will determine hours per day)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>1* (.4)</td>
<td>4</td>
</tr>
<tr>
<td>4</td>
<td>1* (.8)</td>
<td>8</td>
</tr>
<tr>
<td>5</td>
<td>1</td>
<td>10</td>
</tr>
<tr>
<td>8</td>
<td>1.6</td>
<td>16</td>
</tr>
<tr>
<td>10</td>
<td>2</td>
<td>20</td>
</tr>
<tr>
<td>15</td>
<td>3</td>
<td>30</td>
</tr>
<tr>
<td>20</td>
<td>4</td>
<td>40</td>
</tr>
<tr>
<td>25</td>
<td>5</td>
<td>50</td>
</tr>
<tr>
<td>29</td>
<td>5.8</td>
<td>58</td>
</tr>
</tbody>
</table>

*Values less than one not accepted
Wage employees do not have an FTE
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BTS is the CHSS web based database that has been developed to replace the old CAS database. Because it is web based you will be able to access it from any computer. The URL for the system is http://bts.gmu.edu and you will use your email ID and password to sign on. We will grant you access only to your department’s orgs, if there is a new person in your department that needs access please let us know so we can set up their correct org access. You must enable JavaScript on your computer to use this system. The following website has directions for using different browsers: http://www.buymebuyme.com/retail/help/javascript.html

You will use the BTS system for the following functions:

1. Upload adjunct positions at the beginning of the fall and spring semesters
2. Upload graduate lecturer positions at the beginning of the fall and spring semesters
3. Upload graduate assistant positions at the beginning of the fall semester for the year, also beginning of the spring semester for anyone not included in fall upload for spring
4. Input the teaching load
5. Raise review
6. Enter tuition waivers throughout the year
7. Generate funding change forms
8. Download grant related documents sent from OSP

USER RESOURCES: SYSTEM PREFERENCES

In this section you can customize a few parts of the application.

1. If your department has a lot of grants and indirects that you won’t be hiring anyone on, you can choose not to see the grants and indirects in the org drop downs.
2. You can enter contract letterhead information so that every time you generate a contract you don’t have to re-enter the address.
ENTERING GRAD ASSISTANTS (GTAS AND GRAS) & SUBSIDIZED GRADUATE HEALTH INSURANCE

1. Click on the “Graduate Assistants” tab and choose the academic year and Fund/org that you will be hiring the students under.

2. Click on the “New Graduate Assistant” link under the actions column to begin adding students.

3. Start off by picking the position number. GA numbers are graduate teaching assistants and GR numbers are graduate research assistants.

4. Next pick the student you are hiring from the drop down list.
   a. If you do not see them on the list hit the “Find” button. This will take you to another page where you will need to type the student’s last name or G#. You can type a partial last name if you aren’t sure about the spelling of the name (for example you can type “humph” and get back all the names starting with that if you weren’t sure how to spell Humphreys). A list of employees with that last name or G# will appear. If your student is on the list hit the “Select” button next to their name.
   b. If you do not see your student’s name on the list, hit the “Create New Person” button under the actions column. You can either fill in all of the information yourself, or search for the person in Banner by entering the G# and clicking on “Check Banner”. Fill in any information not automatically pulled from Banner. Hit the “Add” button and it will automatically take you back to the Graduate Assistants page and the person will now be in the drop down list.

5. Click the boxes next to the semesters that the student will be working.

6. In “GA Benefit” section, select “Eligible for Graduate Assistant Benefits” if you are sure this student will be eligible for 100% University-supported health insurance.
   a. If the student meets ALL requirements listed on the left side of the table, no other options need to be selected (see below).
b. If the student does not meet all of the requirements listed on the left, but you know the person will be eligible, after you selected “Eligible for Graduate Assistant Benefits”, select all applicable reason(s) that support student’s eligibility from the right side of the table (see below).

<table>
<thead>
<tr>
<th>Eligible for Graduate Assistant Benefits?</th>
<th>Exceptions as applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student meets all of these requirements:</td>
<td></td>
</tr>
<tr>
<td>- Enrolled in PhD or MFA program</td>
<td>Program status changing (to PhD or MFA)</td>
</tr>
<tr>
<td>- A full time student as defined by the University Catalog</td>
<td>Min. # credits completed (working full time on dissertation)</td>
</tr>
<tr>
<td>- Is supported by a tuition waiver or grant covering enough credits to support the student's full time course load</td>
<td></td>
</tr>
<tr>
<td>- Is appointed to a full time (20 hours/week total) graduate assistantship(s) with a stipend of at least $10,000 per academic year. The assistantship(s) must cover both the fall and spring semesters</td>
<td>Multiple Assignments (please specify in the comments)</td>
</tr>
</tbody>
</table>

Multiple Assignments (please specify in the comments)

- Intending to graduate in current fall semester - eligible for fall coverage only (stipend > 5,000)

c. Students who intend to graduate in the current fall semester are eligible for only that semester of subsidized health insurance coverage. If the student does not graduate in the fall, s/he can re-enroll in the spring at their own expense and only for the remainder of that year’s coverage.

d. Dean’s Office will use your input to generate a list of eligible students to submit to Provost, and will conduct spot checks to monitor students’ eligibility.
7. Select the matrix that you will be paying the student from. If you will not be paying the student an amount from the Grad Assistant Compensation Matrix, choose “Override” and type the amount in the “Non-Matrix Amount” box. The amount that you put in the “Non-Matrix Amount” box should be the total amount you are paying them (not the per credit hour amount from the matrix).

8. Fill in the number of hours the student will be working each week and hit the “Add” button.

9. You will return to the GA roster screen where the Hours per Day, Hours Per Pay, FTE, and Salary will be calculated for the student.

10. To print the GA roster click on the “Reports” tab. Pick the “GTA/GRA Report” from the drop down list, your org and the fiscal year. You will not need to pick a semester for the GTA/GRA reports. You will need to print the page as landscape.
1. Click on the “Part Time Faculty” tab and choose the Academic Year, Semester, and Fund/Org for which you will be hiring the adjunct.

2. Click on the “New Part Time Faculty” link under the Assignment Actions column to begin adding adjuncts.

3. Next pick the adjunct you are hiring from the drop down list.
   a. If you do not see them on the list hit the “Find” button. This will take you to another page where you will need to type the adjunct’s last name or G#. You can type a partial last name if you aren’t sure about the spelling of the name (for example you can type “humph” and get back all the names starting with that if you weren’t sure how to spell Humphreys). A list of employees with that last name or G# will appear. If your adjunct is on the list hit the “Select” button next to their name.
   b. If you do not see your adjunct’s name on the list, hit the “Create New Person” button under the actions column. You can either fill in all of the information yourself, or search for the person in Banner by entering the G# and clicking on “Check Banner”. Fill in any information not automatically pulled from Banner. Hit the “Add” button and it will automatically take you back to the Part Time Faculty page and the person will now be in the drop down list.

4. Select the position number for the adjunct.

5. Select the matrix that you will be paying the adjunct from. If you will not be paying the adjunct from the Part-Time Faculty Salary matrix, choose “Override” and type the amount in the “NonMatrix Amount” below. The amount that you put in the “Non-Matrix Amount” box should be the total amount you are paying them (not the per credit hour amount from the matrix).

6. If the adjunct is teaching a Monday/Wednesday/Friday class, click the “$400 Adjunct Supplemental?” box. This will add $400 to the adjunct’s total salary on the part time roster page.

7. The "Credit Hours" now will show up. Please choose standard credit hours for this course and equivalent FTE (e.g. "3 - 0.25" means 3 credit hours, 0.25 FTE) from the drop-down menu, or if there’s a non-standard credit hour you need to enter, such as 2.5 or 3.5, please select "Override" and enter the "Non-Standard FTE" below.
8. After you complete the "Credit Hours" or if you select "Override" and complete the "Non-
Standard FTE", the "Add" button will be activated. Click on "Add".

9. This will return you to the part time roster. You will see the adjunct you just added. Click on the
red “Add Course” link under the course column. This will take you to a different page where you
will choose the class and section the adjunct is teaching. You must add a course or the adjunct
will not be part of the upload.

1) Choose the subject that the class is a part of. A drop down of classes will appear. Choose the class
they are teaching. Next choose the section they will be teaching and hit the “Select” button. A
“Select This Course” button will appear at the bottom of the page. Hit this button and it will take
you back to the roster and the class will now be added to the adjunct’s line.

10. If an adjunct is teaching more than one class you will need to add a line for each class that they
are teaching.

11. To print the Part time roster click on the “Reports” tab. Pick the “Part time Department Report”
from the drop down list, your org, the fiscal year and semester. You will need to print the page as
landscape.
FACULTY OVERLOAD

Full-time Instructional Faculty, Administrative Faculty, Research Faculty, and Classified Exempt Employees who are teaching a course(s) in addition to their regular assignment for additional pay are considered Faculty Overloads. Overloads must be approved by the faculty member’s supervisor, the Chair or Director of the hiring department, as well as the Provost and they are paid according to the Part-time Salary Matrix.

Full-time Instructional Faculty should be hired using the ‘FV’ pooled position number while Admin Faculty, Research Faculty, and Classified Exempt Employees should be hired using the ‘PO’ pooled position number. BTS now generates a contract with the correct overload information based on your input in the Part-Time Faculty screen.

1. Follow steps 1 -3 from the “Entering Part-Time Faculty” section.

2. If the person that you are hiring currently holds a full-time position in an Instructional, Admin, or Research Faculty or Classified Exempt capacity, check the box titled “Does this person already hold a permanent Instructional Faculty, Admin Faculty, Research Faculty or Classified-exempt employee appointment?”

3. Once you’ve selected the checkbox, a drop-down will appear for you to choose the classification of the full-time position that the person holds. Your selection will signal the system to populate the Position field with either an ‘FV’ or ‘PO’ position number.

4. Select pay matrix from which the adjunct should be paid. Please note that Faculty Overloads are paid from the part-time Salary matrix.

5. Follow steps 6 - 12 from the “Entering Part-Time Faculty” section.
6. The contract that you generate from the roster summary screen will automatically include 4 signature lines that are required for this type of hire:
   
   Hiring Department Chair Person  
   Hired  
   Full-Time Position Supervisor  
   Provost

***A short paragraph justifying the reason for hiring this employee as a Faculty Overload must accompany the contract to be sent to the Provost for approval.

**ENTERING GRADUATE LECTURERS**

1. Click on the “Graduate Lecturer” tab and choose the Academic Year, Semester, and Fund/Org.

2. Click on the “New Graduate Lecturer” link under Actions to begin adding GLs.

3. The position number will default to ‘GL’.

4. Next pick the name of the GL you are hiring from the drop down list.
   
   a. If not in list, hit the “Find” button then type the GL’s last name or G#. You can type a partial last name if you aren’t sure about the spelling (for example: typing “humph” will list all names starting beginning with “humph” if unsure how to spell Humphreys). If your GL is on the list hit “Select” button next to their name.  
   
   b. If GL is not on the list, hit the “Create New Person” button under the actions column. You can either fill in all of the information yourself, or search for the person in Banner by entering the G# and clicking on “Check Banner”. Fill in any information not automatically pulled from Banner then hit the “Add” button.

5. Select the matrix from which GL will be paid. If not paying from Part-Time Salary Matrix, choose “Override” and type the amount in the “Non-Matrix Amount” box. The amount that you put in the “Non-Matrix Amount” box should be the total amount to pay, not the per credit hour amount.

6. If the GL is teaching a Monday/Wednesday/Friday class, click the “$400 Adjunct Supplemental?” box. This will add $400 to the GL’s total salary on the Graduate Lecturer roster page.

7. Then enter the FTE for the GL and hit the “Add” button.
8. This will return you to the Graduate Lecturer roster. You will see the GL you just added. Click on the red “Add Course” link under the course column. This will take you to a different page where you will choose the class and section the GL is teaching. You must add a course or the GL will not be part of the upload.

2) Choose the subject that the class is a part of. A drop down of classes will appear. Choose the class they are teaching. Next choose the section they will be teaching and hit the “Select” button. A “Select This Course” button will appear at the bottom of the page. Hit this button and it will take you back to the roster and the class will now be added to the GL’s line.

9. If a GL is teaching more than one class you will need to add a line for each class that they are teaching.

10. To print the Part time roster click on the “Reports” tab. Pick the “Graduate Lecturer Report” from the drop down list, your org, the fiscal year and semester. You will need to print the page as landscape.

It is recommended that you complete all graduate assistant assignments before you start entering waivers. This way all students’ names will be in the drop-down menu and will have been reviewed for health insurance eligibility when you are ready to add waivers. This feature stays open in BTS year round. Deadlines are established during each upload so that students do not receive late fees.

ADD AND UPDATE TUITION WAIVERS

1. Click on the “Waivers” tab and choose academic year and fund/org.

2. Click on the link “New Tuition Waiver” under “Actions”
   a. Select the Person, Residency, Employment Status, Degree, and enter all applicable waiver credit hours that the student will receive.
   b. The associated per-semester Education Resource Fee (ERF) is automatically added to a student’s total planned waiver ($100 for more than 6 credits, and $60 for 6 credits or fewer).

   \[
   \begin{array}{|c|c|c|c|}
   \hline
   \text{Fall} & \text{Credit Hours} & \text{ERF (Education Resource Fee): $60} \\
   \hline
   & 3 \quad \downarrow & , \quad 0 \quad \uparrow \\
   \hline
   \end{array}
   \]

c. Click “Add” to confirm.
3. Once the student is added, it will bring you back to the summary screen and you can repeat the above steps until all have been entered.

4. To view/update waivers for a student:
   a. Click on the link “View/Update” to the right of the student’s record.
   b. You can change Residency, Employment Status, Degree, and waiver credit hours that the student will receive. Click “Update” to confirm.

**NEW! CHANGES TO THE RESIDENCY STATUS IN WAIVER SCREEN**

Students meeting all of the eligibility requirements for Subsidized Graduate Health Insurance will be charged tuition at In-State Rates regardless of whether they enroll in the insurance program. When in the Waiver screen, if you select a student that has been indicated as eligible for health insurance in the Graduate Assistants screen, you will notice that the Residency auto-populates to In-State. This field is changeable, but please verify which Residency rate the student should be charged based on whether they meet those requirements.

**ACTUALS IN TUITION WAIVERS SCREEN**

After the Last Day to Drop Classes, tuition waivers will be applied to students’ accounts in Banner. The Dean’s Office will then load theses waivers, referred to as “Actuals”, into BTS. This load will happen at the beginning of each week. You will be able to view and compare “Planned” versus “Actual” waivers to reconcile and distribute any remaining funds.

1. Click on the “Waivers” tab and choose Academic Year and Fund/Org. All of the waivers you previously entered should appear in the screen at this time.
2. At the top right there will be an option to “Display Banner Actuals?” Select Yes.

3. The Waivers table will now show, by semester:

   A. The number of credit hours of tuition waivers that the department planned for the student to receive.
   
   B. The tuition waivers expressed in a dollar amount planned for that student.
   
   C. The amount of actual tuition waivers applied to the student’s account from Banner.
   
   D. Total planned waivers, total actual waivers, and the difference between the two. Totals for each student are to the right and totals for the entire department are along the bottom.
1. Click on the “Raise Review” tab.
2. Select the current fiscal year and your org from the drop down.
3. All E&G funded faculty and admin faculty in your department will be listed with their current salary.
4. Your dept’s allocation is displayed in the upper right corner of the form. At the bottom of the eligible faculty list you will see a department balance. Please ensure that you do not exceed your allocation.
5. The column “Dean’s Commits” indicates raise amounts that are funded centrally, pending Provost approval, based upon earlier request for special increases.
6. The chair’s raise recommendations should be entered under the “chairs commits” column by clicking on the blue link to the amount.
   a. Newly hired faculty, faculty who received very significant raises or research faculty will not be in the dept’s raise pool and have been moved to the bottom of the raise roster page under “CHSS Finance Categories”.
   b. Please use the comments field to provide additional information for large salary raises.
   c. Faculty split with other entities are shown with pro-rated salary. Department chairs should coordinate raises with other departments responsible for split faculty to ensure that the full intended raise is provided. The department should only show its prorated share of the raise based on the salary displayed.
7. After entering the recommended amount and comments, click “add” to return to the roster screen. You will be able to make changes until the deadline.
8. To print the Raise Review click on the “Reports” tab. Pick the “Raise Review report” from the drop down list, your org, and the fiscal year. You will need to print the page as landscape.
1. Select the "Teaching Load" tab and then the "fiscal year" and your "org" from the drop down boxes.

2. You will see the enrollment target for your Department in the top mid portion of the screen ("Course FTE Target"). The enrollment targets may change and we will adjust the calculations accordingly if that happens.

3. The individual department enrollment target was used to calculate the faculty required for next year as follows: based on historical number of sections offered and actual enrollment FTE generated, we calculated the ratio of enrollment FTE to faculty FTE (teaching power). This ratio was then used to convert the next year's enrollment target into faculty FTE required in order to meet your target.

4. Faculty members of your department will be listed and their individual "net teaching" load for Fall and Spring will have been populated.

   - The "net teaching" load is the standard load defined for that individual faculty member minus any permanent administrative reduction (ex.: chair, program director) and is displayed in terms of FTE (.25 FTE/class). The standard load, administrative reduction and the net teaching information are kept in an area of BTS that the departments do not have access to change. You can see the detail info by clicking “view/update” by the faculty’s name. If the net teaching is incorrect in the department screen, you should contact Leslie, Karina or Laura. An example of how the net teaching is calculated is below.

<table>
<thead>
<tr>
<th></th>
<th>Fall</th>
<th>Spring</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Load</td>
<td>0.50</td>
<td>0.50</td>
<td>2 - 2 load</td>
</tr>
<tr>
<td>Administrative Reduction</td>
<td>-0.25</td>
<td>0</td>
<td>Biodefense Director</td>
</tr>
<tr>
<td>Net Teaching</td>
<td>0.25</td>
<td>0.50</td>
<td>This is what will be displayed in the department’s teaching load screen for the individual faculty member</td>
</tr>
</tbody>
</table>
5. If a faculty member is teaching the net teaching, no action is needed

6. If a faculty member is going to have a course release that is **not** an administrative reduction (ex.: leaves, grant buy outs), you need to click on the "View/Update" link by the faculty's name. You will need to choose a modifier from the drop down and fill the FTE that is being released as a negative number as well as the reason for the release. Click "Update" and it will take you back to the teaching load roster. For example:

<table>
<thead>
<tr>
<th></th>
<th>Fall</th>
<th>Spring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard</td>
<td>.50</td>
<td>.50</td>
</tr>
<tr>
<td>Administrative</td>
<td>-.25</td>
<td>0</td>
</tr>
<tr>
<td>Net</td>
<td>.25</td>
<td>.50</td>
</tr>
<tr>
<td>Grant buyout</td>
<td>0</td>
<td>-.25</td>
</tr>
<tr>
<td>Grand total</td>
<td>.25</td>
<td>.25</td>
</tr>
</tbody>
</table>

- Please include only the faculty teaching provided to your department. For example, if a faculty member teaches two sections for your department and a third section for the Honors program, the teaching will be shown as .75. You should then choose “teaching for another CHSS department” from the modifier drop down (please specify the department in the comments box).

To show any additional teaching power that you receive such as Robinson Professors or faculty from other departments or colleges, you will need to click on “Add (Different Org.).” You will fill in the department the faculty is coming from, the faculty member’s name and the FTE that they are teaching each semester. They will show at the bottom of the list below your faculty roster and vacant positions.

To print the Teaching Load click on the “reports” tab. Pick the “Faculty Teaching Load report” from the drop down list, your org, and the fiscal year. You will need to print the page as landscape.
Before you start, please check out the following tips:

**TIP 1: MASTER LETTERHEAD**

Before you generate any contracts, we recommend that you go to “User Settings” and choose “System Preferences”. Enter the letterhead information for your department so that you only need to do it once instead of every time you generate contracts. You always have the option to modify this master letterhead information in “User Settings”, and you will also be able to modify the letterhead information before the contracts are generated.
TIP 2: DISABLE POP-UP BLOCKER

BTS will use pop-up windows to guide you through the contract process. In order to streamline the process, you may want to disable the pop-up blocker on your computer.

Internet Explorer (IE) Users:
Please open IE, go to “Tools” and then click on “Internet Options”. Go to Privacy (1) tab, uncheck “Block pop-ups (2)”, hit “Apply (3)”, and click on “OK (4)”.

Firefox Users:
Please open Firefox, go to “Tools” and then click on “Options”. Go to Content (1) tab, uncheck “Block pop-up windows (2)”, and click on “OK (3)”.  

Note: If you have installed Yahoo/Google/MSN tool bars, you may have to uninstall the pop-up blockers that came with the tool bar package.
1. After you enter all your assignments, save your master letterhead information, and disable the pop-up blocker, please go to any of the “Part-time Faculty”, “Grad Assists”, or “Graduate Lecturers” roster tab that you wish to generate contracts for. We will use “Part-time Faculty” for example below.

<table>
<thead>
<tr>
<th>Person</th>
<th>Position</th>
<th>Funding</th>
<th>Position Budget Reports</th>
<th>Teaching Load</th>
<th>Grade Review</th>
<th>Permanent Positions</th>
<th>Staff</th>
<th>Part-Time Faculty</th>
<th>Graduate Assistants</th>
<th>Graduate Lecturers</th>
<th>Administration</th>
<th>Finance</th>
<th>User Resources</th>
<th>Working</th>
<th>Grants</th>
<th>&quot;All&quot;</th>
<th>Print Contract</th>
<th>Semester</th>
<th>Position</th>
<th>Person</th>
<th>Course</th>
<th>Matrix</th>
<th>Overtime</th>
<th>Salary</th>
<th>FTE</th>
<th>Assign</th>
<th>New Part Time F:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall</td>
<td>P01920C</td>
<td>Anagnostopoulos, Thalia</td>
<td>HIST 618 622 78181</td>
<td>A2</td>
<td>0.00</td>
<td>0.2500</td>
<td>2335.00</td>
<td>View/edit</td>
<td></td>
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</tr>
<tr>
<td>Fall</td>
<td>P01920C</td>
<td>Anagnostopoulos, Thalia</td>
<td>HIST 618 640 78127</td>
<td>A2</td>
<td>0.00</td>
<td>0.2500</td>
<td>2335.00</td>
<td>View/edit</td>
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<tr>
<td>Fall</td>
<td>P01920C</td>
<td>Anagnostopoulos, Thalia</td>
<td>HIST 618 627 75494</td>
<td>A2</td>
<td>0.00</td>
<td>0.2500</td>
<td>2335.00</td>
<td>View/edit</td>
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<tr>
<td>Fall</td>
<td>P01920C</td>
<td>Driving, Jennifer</td>
<td>ARTH 101 804 78063</td>
<td>A1</td>
<td>0.00</td>
<td>0.2500</td>
<td>2335.00</td>
<td>View/edit</td>
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<tr>
<td>Fall</td>
<td>P01920C</td>
<td>Holikov, Harry</td>
<td>HIST 310 090 78575</td>
<td>B3</td>
<td>0.00</td>
<td>0.2500</td>
<td>2335.00</td>
<td>View/edit</td>
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<tr>
<td>Fall</td>
<td>P01920C</td>
<td>Johnson, Kathy</td>
<td>ARTH 314 801 88063</td>
<td>B1</td>
<td>0.00</td>
<td>0.2500</td>
<td>2335.00</td>
<td>View/edit</td>
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<tr>
<td>Fall</td>
<td>P01920C</td>
<td>Jones, Daniel</td>
<td>HIST 618 620 75674</td>
<td>A2</td>
<td>0.00</td>
<td>0.2500</td>
<td>2335.00</td>
<td>View/edit</td>
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<tr>
<td>Fall</td>
<td>P01920C</td>
<td>Klement, Michaela</td>
<td>ARTH 312 091 78327</td>
<td>B3</td>
<td>0.00</td>
<td>0.2500</td>
<td>2335.00</td>
<td>View/edit</td>
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<tr>
<td>Fall</td>
<td>P01920C</td>
<td>Davidson, Alan</td>
<td>HIST 625 090 75959</td>
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<td>0.2500</td>
<td>2335.00</td>
<td>View/edit</td>
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<tr>
<td>Fall</td>
<td>P01920C</td>
<td>Metcalf, William</td>
<td>HIST 215 091 78654</td>
<td>A1</td>
<td>0.00</td>
<td>0.2500</td>
<td>2335.00</td>
<td>View/edit</td>
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<tr>
<td>Fall</td>
<td>P01920C</td>
<td>Johnson, Bill</td>
<td>HIST 731 091 78634</td>
<td>C0</td>
<td>0.00</td>
<td>0.2500</td>
<td>2335.00</td>
<td>View/edit</td>
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</tbody>
</table>

2. Select the Academic Year (for ex.: 2008-2009), Semester (for ex.: Spring) and your org from the top drop-down menus. You have the choice of selecting all assignments of specific instructors (or students) by checking the checkbox on the left of the first row for that instructor (or student), or you can click on “All” (circled below) to select all of the people listed under your org. If all the instructors/students are selected, the “All” link now will change to “Clear”.

3. If for any reason, you wish to reset/clear your selection, please click on the “Clear” link (circled in below in the second screenshot).

4. Once you have selected the people you wish to generate the contracts for, please click on “Contracts” button on the upper right. Please note that if a person has two or more assignments, you will only see one checkbox for the person, as the information will be lumped into one contract for the same person.
5. A new window will pop up. Fill in the requested information for the letterhead (auto-populated if you saved a master copy) and contract body. As long as you use the same computer, all of the information you enter in these fields will remain for the next contracts you create. Click the "Create Microsoft Word Document" button.

   a. "Supervisor" and "Optional Contact" fields can remain blank for Part-Time contracts if not applicable.

This program creates a Microsoft Word document that includes a contract for each person selected on the prior screen. The information provided below will be included in each contract.

**Letterhead Info**

<table>
<thead>
<tr>
<th>Department</th>
<th>College of Humanities and Social Sciences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>4400 University Drive</td>
</tr>
<tr>
<td>City, State, Zip</td>
<td>Fairfax, VA 22030</td>
</tr>
<tr>
<td>Mailstop</td>
<td>3A3</td>
</tr>
<tr>
<td>Phone</td>
<td>703-993-8612</td>
</tr>
<tr>
<td>FAX</td>
<td>703-993-8714</td>
</tr>
</tbody>
</table>

**Contract Body**

<table>
<thead>
<tr>
<th>Academic Unit</th>
<th>CHSS Dean's Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor</td>
<td></td>
</tr>
<tr>
<td>Signatory Name</td>
<td>Deborah Boehm-Davis</td>
</tr>
<tr>
<td>Signatory Title</td>
<td>Dean</td>
</tr>
<tr>
<td>Acceptance Cut-off Date</td>
<td>July 4, 2014</td>
</tr>
<tr>
<td>Optional Contact</td>
<td></td>
</tr>
</tbody>
</table>

Download the pages for First-time Hires

Create Microsoft Word Document
6. Click on "Save As" from the Save drop down option to save the file to your desk top or a location you prefer on your computer.

7. The contracts are saved to your computer as a word document. We strongly suggest that you save it where you can refer to and make changes to the contracts later. For example, you may need to change someone’s contract if one of his/her classes is canceled after we close the BTS system.

8. Please note that the contracts will be exported into one large word document instead of individual ones by person.

9. BTS will indicate that the instructor is receiving a $400 supplement when teaching a MWF class if you activated the increment by selecting "$400 adjunct supplemental" box (when adding the assignment), by printing a "(includes $400 MWF supplemental)" note by the salary amount;
10. Be sure to check that you enter an **Acceptance Cut-off Date** every time you generate contracts. This field will always be left blank and will not be auto-populated. BTS will **not** give you a warning if you do not have this information.

11. Before we lock BTS, you can change the assignments and download most up-to-date contracts again as often as you want. However, if you need to make changes to any contract after we lock BTS, the best way to do so is to make changes in your last saved contract Word document in your computer.

---

**GENERATE CONTRACTS (GRAD ASSISTS AND GRADUATE LECTURERS)**

**BEFORE WE START**

- Same procedures above basically apply to GTA, GRA, and GL assignments. However, when you enter the contract body information, you will have to fill in more information: “Supervisor” (required) and “Optional Contact” (optional) before contracts can be generated. Due to the added “Supervisor” information, you may have to generate some contracts one by one, or you can group several GTAs/GRAs/GLs with the same supervisor together to have the field auto-populated in their contracts.

- Ideally, you should also have the **Tuition Waiver** information ready so you can enter the “Tuition Benefits” information in GTAs/GRAs/GL contracts. Please note that “Tuition Benefits” will **not** be auto-populated.

- Please note that if you selected certain GTAs/GRAs (no GLs) to be eligible for health insurance, two additional Provost-approved paragraphs regarding this benefit will be automatically inserted into their BTS-generated contracts.

**STEPS**

1. After you enter all your assignments, save your master letterhead information, and disable the popup blocker, please go to “Grad Assists”, or “Graduate Lecturers” roster tab that you wish to generate contracts for.
2. Select the Academic Year (2008-2009), Semester (Spring) and the org you wish to work with from the top drop-down menus. You have the choice of selecting all assignments of specific instructors (or students) by checking the checkbox on the left of the first row for that instructor (or student), or you can click on “All” (circled below) to select all of the people listed under your org. Just be aware that the people you select to generate contract together need to have the same supervisor.

3. If all people are selected, the “All” link now will change to “Clear”.

4. If for any reason, you wish to reset/clear your selection, please click on the “Clear” link (circled in below in the second screenshot).

5. Once you have selected the people you wish to generate the contracts for, please click on “Contracts” button on the upper right of your fund/org. Please note that if a person has two or more assignments, you will only see one checkbox for the person, as the information will be lumped into one contract for the same person.
6. A new window will pop up. Fill in the requested information for the letterhead (auto-populated if you saved a master copy) and contract body. “Supervisor” is a required field. “Optional Contact” field is optional. Click on the "Create Microsoft Word Document" button.

This program creates a Microsoft Word document that includes a contract for each person selected on the prior screen. The information provided below will be included in each contract.

This program utilizes MaDoc Generator, written by Max S. Pereira and provided under GNU General Public License.

Letterhead Info

Department College of Humanities and Social Sciences
Address 4400 University Drive
City, State, Zip Fairfax, VA 22030
Mailstop 3A1
Phone 703-993-8612 FAX 703-993-8714

Contract Body

Academic Unit CHSS Dean's Office
Supervisor Irene Mills
Signatory Name Deborah Boehm-Davis
Signatory Title Dear
Acceptance Cut-off Date July 4, 2014
Optional Contact Irene Mills

Download the pages for First-time Hires
Create Microsoft Word Document...

7. Click on "Save As" from the Save drop down option to save the file to your desk top or a location you prefer on your computer.
8. The contracts are saved to your computer as a word document. We strongly suggest that you save it where you can refer to and make changes to the contracts later. For example, you may need to change someone’s contract if one of his/her classes/assignments is canceled after we close the BTS system.

9. Please note that the contracts will be exported into one large word document instead of individual ones by person each time you generate the contracts.

10. Be sure to check that you enter the Supervisor’s name every time you generate contracts. Make sure it is the correct supervisor’s name for the contract(s) you are generating. BTS will not give you a warning if you do not have this information.

11. Before we lock BTS, you can change the assignments and download most up-to-date contracts again as often as you want. However, if you need to make changes to any contract after we lock BTS, the best way to do so is to make changes in your last saved contract Word document in your computer.

*Please note that for grad assistants and graduate lecturers you will need to type in any tuition benefit into the contracts generated. That’s why it’s good to have the Tuition Waiver Spreadsheet handy!
Below are some areas you can help new (original hire) adjuncts transition into Mason smoothly:

<table>
<thead>
<tr>
<th>Items</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
<td>If you would like to help new adjuncts to obtain their email addresses before the upload, an Affiliate EA needs to be submitted and completed in Banner.</td>
</tr>
<tr>
<td>Parking Pass</td>
<td>Parking Services will require a photo ID to issue a parking pass. However, if the adjunct is already issued G # and has a copy of their contract, parking services will make an exception to issue them the pass.</td>
</tr>
<tr>
<td>Photo ID</td>
<td>Adjuncts won’t be able to get their photo ID until their NBULST is populated. That happens after the assignments are uploaded from BTS to Banner.</td>
</tr>
<tr>
<td>Access to the class list on Patriot Web</td>
<td>The PEAEMPL screen needs to be populated. This happens when an Affiliate EA is submitted and completed in Banner.</td>
</tr>
<tr>
<td>Library Access</td>
<td>If Reserves are needed for a class, please have your Adjunct contact Cynthia Bentley at ext 3-9057 with their contract. Adjuncts won’t be able to check out books without Photo ID.</td>
</tr>
</tbody>
</table>
GRANTS DATABASE

A database of all grants for which departments have access can be viewed and filtered by Principal Investigator, Org, or specific Fund Number/Title. Information such as expected effort to be charged, actual effort charged, award dates, funded amounts, and award documents can now be found in BTS.

VIEW DEPARTMENT GRANTS

1. Hover the mouse over the “Grants” tab then select “Grants/Funds”
2. Select the Principal Investigator, Org number, or Specific Fund to view applicable awards
3. For each grant you will see:
   i) The Title, Sponsor, and Principal Investigator
   ii) Associated Funds
   iii) Start and End Dates for each grant
   iv) Initial and revised award amounts

### Selection

<table>
<thead>
<tr>
<th>PI</th>
<th>Org</th>
<th>Fund</th>
<th>Sort By</th>
<th>Title</th>
<th>Sponsor</th>
<th>PI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>100701, Criminology, Law &amp; Society G&amp;C</td>
<td>Select</td>
<td>Fund</td>
<td>AMAR/NHACE Related Activities</td>
<td>AMAR International, Inc</td>
<td>Taxman, Faye</td>
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<tr>
<td>201889</td>
<td>HRQOD/HRQOD/Network Justice Health</td>
<td>Start: 30-SEP-09 End: 31-JUL-12 US Department of Health and Human Services</td>
<td>Gallagher, Catherine</td>
<td></td>
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<tr>
<td>202003</td>
<td>HRQOD/HRQOD/Network Justice Health</td>
<td>Start: 30-SEP-09 End: 31-JUL-12 Initial Award: $285,121.00 Revised Award: $285,121.00</td>
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<tr>
<td>Fund(s)</td>
<td>222070</td>
<td>CLS/Transition Planning Pilot</td>
<td>University Legal Services for the D Taxman, Faye</td>
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<tr>
<td>Start: 01-JUL-11 End: 31-DEC-13 Initial Award: $85,737.00 Revised Award: $85,737.00</td>
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</tr>
<tr>
<td>Fund(s)</td>
<td>222097</td>
<td>City of Seattle/Police Practices</td>
<td>City of Seattle Weinburd, David</td>
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</tr>
<tr>
<td>Start: 20-DEC-11 End: 31-DEC-12 Initial Award: $42,000.00 Revised Award: $42,000.00</td>
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</table>

### FUND DETAIL

To view detailed information for a specific Fund, click on the Fund Detail icon (magnifying glass).

Information included in detail screen includes:
1) Roster

Faculty with effort budgeted are listed in the top section.

b. The column “FCF Actual” reflects salary charged to grants (all salary charged to grants, not only the grant being viewed) based on funding change forms received by the Dean’s Office. The “FCF Expected” column reflects salary expected to be charged based on sponsor approved budgets.

c. Clicking on the Grant Roster Detail icon (magnifying glass) displays notes on funding change forms received and effort still expected for that person.

i. “Modifiers” are listed by Start Date and are not limited to the grant being viewed, but rather include all salary modifications expected.

ii. A “No” in the 4Cast column indicates that paperwork has been received to redistribute salary. A “Yes” means that effort is expected to be charged based on the grant budget, but paperwork hasn’t been received.

iii. “Percent” is the percentage of salary between the Start and End Dates to be charged to the grant based on the budget and is also referenced in the “Comments” column. “Amount” is sometimes used instead of “Percent” and is the dollar amount charged to the noted source. You will only see one or the other column used.

iv. “Impact” is the dollar amount charged to the specified destination whether “Percent” or
“Amount” is used.

v. Comments Example 1: When a funding change form is received by the Dean’s Office to charge 10% of John Doe’s salary to grant 2xxxxx from June 10, 2012 through June 24, 2012, the comment will read “10% on 2xxxxx”.

vi. Comments Example 2: If a funding change form is expected because John Doe has 55% budgeted on grant 2xxxxx from August 25, 2012 to June 9, 2013, you will see a red “Yes” under the 4Cast column.

2) Notes

i. Notes can be entered in this screen either by the Dean’s Office or the Department.

ii. Notes can only be updated by the person that entered them.

iii. To enter a note: type your message in the box with “Enter your new note here...” then click “Save Note”.

iv. The message will appear below the “Note” column at the bottom of the page. The name of the person entering the message will appear under “Person” along with the date the note was entered.

v. To change a note that you originally entered: Type over the previous note in the bottom section. Then click “Update” to save it. If you do not click “Update” the note will not appear next time you are in the screen. vi. After updating a note, the date the change was made will appear under “Date”.

3) Documents
a. Award and budget documents related to each fund will be uploaded into BTS.

b. Documents can be viewed and saved two ways:
   
   i. Click on an icon under the “Viewer” column to see the document in a new screen. Select print or save at the top of the screen.  
   ii. Click on a link under the “Download” field to view or save the document.

c. The type of document and date sent by the Office of Sponsored Programs will be listed under the “Finance Comment” field.

d. To enter your own notes or comments, type a message in the “Department Comment” field and click “Update”. Department notes are not required.