

# EZ-EPAF CHECKLIST

1. **Employee legal name and G#. Verify in Banner that this person has a completed SPAIDEN record.**
2. Check Banner for the employee status to verify correct position type:
  - If they may be a student. Check the SGASTDN screen to see if they are an active student.
    - (a) Please note that if a Graduate student is still defending their dissertation, they are still considered a student hire. You will see a comment on the SGASTDN page “Advanced to Candidacy”.

Student Wage (SW)	Non-Student Wage (WG)
Primary relationship is the pursuit of an academic degree while working part-time	Primary relationship is to provide a service in exchange for wages
If enrolled as a full-time student, fringe rate not charged (FICA exempt)  Student fringe rate charged if enrolled as a part-time student (not FICA exempt)	Wage fringe rate charged
Every payroll is compared with Registrar’s List – if not a full-time student, student fringe rate is charged	Full-time students hired as wage employees will be charged fringe
Terminate as SW when graduated, rehire as WG	Terminate as WG, rehire as SW if employee becomes a student

- If they are faculty. Check the PEIESUM screen to verify whether they are Adjunct, Full-time or Faculty/Admin. Only full time faculty and Admin. Faculty and Classified Exempt employees can be paid Misc. Pay stipends.
3. **Org./Fund number paying for the position (verify position needed is set up on Org., grant or fund by checking “Pooled Positions” site in Patriot Web/ Employee tab.**  
**If the Pooled Positions site shows no position set up please do the following:**
    - If the position is set up on an Org. (starts with a “1”). Contact [HRoffice@gmu.edu](mailto:HRoffice@gmu.edu) and request the position be set up. You will need to provide a point of contact to HR
    - If the position is set up on a Fund (grant – starts with a “2”) complete the OSP Pooled Position Request form and submit to [chssrsch@gmu.edu](mailto:chssrsch@gmu.edu) for review and approval. Be sure to ask that the BASE DATE of the position be set to the funding start date for the grant if applicable.
  4. Salary amount or wage per hour.
    - Student wage and non-student wage maximum: \$50.00/hr.
    - Any amount above this limit requires a justification be included in the Comments section

of the EZ-EPAF (approval must be obtained from HR).

5. Begin and end date for payment - Wage payments can begin and start on any date. If the date you need is not in the EZ EPAF pull-down menu (its 18 mos. in the future), use the two-year radio button. If you still cannot locate the date, add the needed date range in the Notes section. **Wage and student wage positions on grants must include an assignment end date (hiring a SW/WG without a term date is not allowed).**
6. Student wage, Wage, GR and GTA employees will need hours per day/hrs. per pay period listed.
  - Follow the wage guidelines pg. 15 of the EZ-EPAF handout.
7. Timesheet administrator name, G# and position number are required in the comments section for student wage and wage EPAF requests.

**8. Labor being charged to a grant or fund:**

1. **If the begin and /or the end date is outside the Period of Performance for the fund. A guarantee Org. must be provided in the Notes section.**
  2. **Insufficient funds on the Fund to be charged. A guarantee Org. must be provided in the Notes section.**
  3. **Insufficient funds in the Labor Budget Line item. In the Notes section, provide which budget line item this cost will be re-budgeted from**
  4. **Labor category is not budgeted. In the Notes section, provide which budget line this will be re-budgeted from.**
  5. **If you are hiring a wage position, OSP requires you provide an estimate of the total expected labor during the position term. Please add comment in the Notes section. Example:” Total expected labor for period of service is 3,000.00.”**
9. **If you are processing summer pay.** Be aware that full time faculty summer pay is limited to 33% of their annual salary base amount. This includes any and all summer positions paid through George Mason. That includes teaching, research, stipends, etc. **Faculty effort on externally sponsored research for summer research (SR) is limited to no more than 90% (2.7 months) of their full summer pay.**

# GRA EPAF Comments

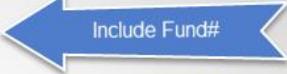
- Include fund number Position Title: Research Assistant 202222
- Include personnel dates and explanation for use
- If GRA effort is not in the budget or budget line item has insufficient funds, explain where the funds are being rebudgeted from
- Provide a guarantee org if GRA start and/or end dates are outside POP and note that an extension is expected
- Provide a guarantee org if there are insufficient funds and note that an increment is expected

## Early Termination of GRA Appointment

- Use when a GRA appointment needs to be terminated prior to the originally planned end date
- Select the Early Termination GRA EPAF approval category
- The termination effective date should be the last day worked
  - Banner will prorate the earnings for the pay period if the termination date is not the last day of the semi-monthly pay period
- HR must receive EPAF in time to stop payment before payroll is processed (at least 3 business days before the last day of the pay period)

If GRA position is terminated (or moved) tuition grant adjustments should also be made if grant paid for tuition

# Wage EPAFs

- Must use wage approval category with termination date for sponsored funds
- Include a distinctive title for position 
  - Helps employee know which timesheet to use in Patriot Web if they hold multiple positions at GMU
- Wages are paid on the bi-weekly (BW/26) pay schedule
- Auditors may want to make sure the pay is comparable to others doing the same job

# Wage EPAF Comments

- Include fund number Position Title: Editor for 202222
- Brief job description
- Estimate maximum hours to be worked or maximum pay expected to earn
- Timesheet approver name, G number, and position number
- HR approval (obtained prior to submission) if pay rate is higher than \$35 per hour
- If wage effort is not in the budget or budget line item has insufficient funds, explain where the funds are being rebudgeted from
- Provide a guarantee org if wage start and/or end dates are outside POP and note that an extension is expected
- Provide a guarantee org if there are insufficient funds and note that an increment is expected

# Summer Research Pay

- Maximum summer salary is 33% of 9-month faculty AY salary (divide base pay by 3)
- Summer salary includes pay for all appointments at GMU (summer research, teaching, and stipends for administrative duties)
  - “Faculty may be paid no more than one third of their prior academic year salary for all summer work, regardless of funding sources.”  
George Mason University Faculty Handbook – 3.3 Summer Salary
- SR amount per pay period should not exceed AY amount per pay period
- Summer salary is not benefited (only 9-month position)
- Check with college dean’s office for additional information if applicable
- Review details of appointment with PI

# SR EPAF Comments

- Include fund number Position Title: Summer Research 202222
- If summer research effort is not in the budget or budget line item has insufficient funds, explain where the funds are being rebudgeted from
- Provide a guarantee org if summer research start and/or end dates are outside POP and note that an extension is expected
- Provide a guarantee org if there are insufficient funds and note that an increment is expected
- Include calculation for summer pay:
  - AY base salary = \$
  - AY per pay period = \$
  - 1/3 of AY (maximum total summer pay) = \$

# Salary Cap Cost Share

- 12-month CY and 9-month AY faculty who exceed the salary cap for NIH and DOJ awards:
  - SC activity code with org must be included to track the cost share portion on FCF
- For faculty summer research: Position Title: Salary Cap Fund 202222
  - Create 2 EPAF positions (contact college dean's office for assistance)
  - First EPAF for position on project
  - Second EPAF for position on org with SC activity code in comment
  - Submit FCF after summer pay has posted to add SC activity code

Salary Cap activity codes cannot be attached as part of the upload or an original hiring action EPAF. However, the Salary Cap activity code should be included in the EZ EPAF notes, so that the activity code can be attached to the position by OSP after the upload is completed and assignments are active.