FAQs from Banner Workflow users

Q: How do I get access to Banner workflow?

A: first, users must have Banner PROD access. If you do not, contact our Banner liaison (Emprisia Lee) for access. The profile you need for Banner workflow is *PWSDRST. There may be other profiles you should have, as well.

Getting Banner PROD access takes a while and is totally out of the control of our office, so please urge new DGS’s, Admins, and Chairs to get access well before they need to make an award.

Once you have a Banner user name (CCO---) send to CCAS Grad Office. CCAS will email DIT (ithelp@gwu.edu) and request “banner workflow graduate awards access” for this user. DIT needs to know if the user should have initiator access or approver access (chairs and second level approver). If someone needs to be added to the chair’s list in Banner Workflow, also let DIT know this.

Q: How do I use the Banner workflow system?

A: DIT has a step by step tutorial available at: https://www2.gwu.edu/~set/GA_Automation/story.html

Q: Does Banner workflow also initiate hire/stipend payment processes for accepted awards?

A: No. In order for a student to be paid, the department must submit a hire form (salary) or SMA request (stipend). If you have questions about how to do this, contact Roy Myaing in the Finance Office.

Q: How do I know if an award is approved?

A: You (and all approvers on the chain) will receive a copy of the award letter email when it is sent to the student.

Q: How do I know if a student accepts or declines an award?

A: All approvers on the workflow will receive a copy of the notification email generated by GWEB when a student has formally accepted. If a student declines admission (see your enrollment report) but does not decline the award, CCAS will go in and decline the award/close the offer on the student’s behalf.

Q: How do I totally remove something I am no longer going to send from my workflow?

A: Click the magnifying glass at right next to the item you want to delete from your queue. Select “Stop Workflow Request”.

Q: I selected the wrong academic year (first data point) in my workflow request. How do I fix this?

A: Right now, the only solution is to delete the workflow and start over.
Q: I sent forward a workflow, where is it right now?

A: This is not very easy to find in the system. But, if CCAS does not have it for approval, it is likely sitting with the Chair. Also, note that requests for fellowship stipends require an additional approval step - the payment characterization checklist. Make sure you have completely approved the award (it will no longer appear on your worklist if it has been fully approved at your stage).

Q: What dates should I put for salary/stipend start and end dates?

A: These dates are standard and remain the same every year for packages. (In some cases, a special stipend could be paid on another schedule) There are no exceptions to the GA hire start and end dates.

- Full Year: 9/1/XX - 5/31/XX
- Fall only: 9/1/XX - 12/31/XX
- Spring only: 1/1/XX - 5/31/XX

Q: But those dates don't line up with the semester dates.

A: GAs are paid on a monthly schedule, similar to the schedule used to paid faculty. This is a payroll requirement and not under CCAS's control.

Q: What info do you need for a salary-only GA appointment?

A: The CRN for the course with which the student is assisting should be included in either the duties section or the comments in the workflow. GA recommendations submitted without a CRN will be returned to you.

Q: Why was my award workflow returned to me?

A: Please log in to the GWeb system and see the comments made in the comments field to determine what needs to be adjusted.

Q: Is full-time or part-time study required?

A: That depends on the nature of the award. A student cannot be over-awarded (ie given more in tuition funds than they plan to take). So, awards for full tuition must require full-time study.

PhD students who are advanced (have already taken 72 credits) should be given an award that requires full-time study and part-time registration.

Q: I need to enter more than 2 award pieces/types on one workflow. The system won't let me.

A: The system allows for up to 8 award pieces. If you enter one piece (ie a salary) and pull from the same drop down menu and add a second type (ie a tuition award) both will save and be included in the workflow. You will see a summary of all payment types entered in the initiator review screen.
If you need to enter more than one tuition or stipend award because there are different payment sources, use the “additional award types” second drop down menu to enter more than one piece of a similar type (ie, more than one stipend).

Q: How do I know what the funding source is for my award?

A: If the award is one paid by CCAS (likely part of your annual award allocation as specified by the Associate Dean for Graduate Studies) the payment source is School Graduate Support.

If the award is a special award (special initiative, endowment, other award included in the annual memo from OGSAF about special awards) the source is “Graduate Student Assistantships and Fellowships”. Pete van Riper must be selected after the CCAS SFC as a GSAF level approver for awards like this.

If you select “other” or “R Fund” please indicate the org # in the comments on the workflow.

Q: Do I need to enter an SFC 2?

A: No. (the SFC 2 is only required for a cross school appointment, ie, a CCAS student on an award from the Elliott School)

Q: Who should be entered on the signature block for the award letter?

A: If the award is from a department fund, the Chair is likely the most appropriate signatory. If it is a research-funded award, the PI for the project may be most appropriate. Please use your best judgment vis a vis the funding source. **Only the CCAS Graduate Office may sign letters on behalf of Dean Brand.**