DELTA STATE UNIVERSITY

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ELECTRONIC PERSONNEL ACTION FORM (EPAF)

Banner Human Resources Self Service User Manual

Release 1.3

August 2020

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INTRODUCTION

The Banner system is a web-based, administrative software application developed by Ellucian. This system provides Delta State University with online administrative functionality. This feature enables authorized users to complete Personal actions via the web (Employee Self Service) for authoring that action. The Human Resources system is a complete employee information and management system within the integrated Banner product.

The Electronic Personnel Action Form (EPAF) function of Banner allows the University to process paperless personnel actions. EPAFs are simple, concise, and allow many values or data elements to default into the document without manual data entry. The forms enable the University to achieve our goal to process personnel actions rapidly, through an electronic approval process, providing an audit trail of all approval/disapproval history.

This reference guide provides step-by-step instructions for using the EPAF functionality in Employee Services. It is required that departmental users complete the EPAF training session with a level of competence in order to gain access to the EPAF functionality.

For questions about EPAF processing, please call x4035 for assistance.

EPAF ORIGINATORS

The EPAF process begins with a change or update for an employee's record and/or job. In order to update the system with the new information, an EPAF must be initiated in Employee Self Service. This section provides the originator with information about accessing EPAFs in Employee Self Service, tracking EPAFs, and deleting transactions that have been started but no longer need to be processed.

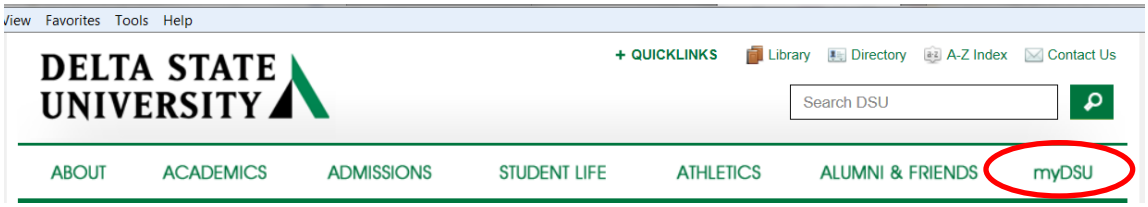
Accessing EPAF menu in DSU Online Services

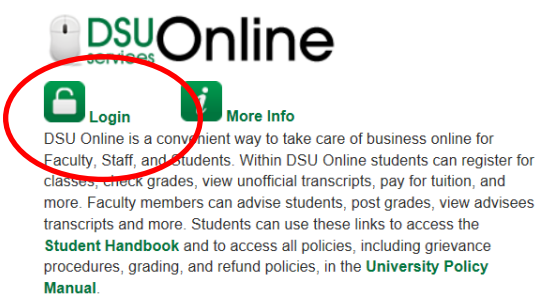
To access the EPAF menu, you must have authorization to initiate and/or approve in DSU Online Services. Once you have the appropriate authorizations, you will need to log on to DSU Online Services.

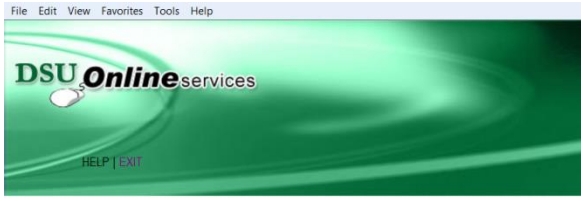
Accessing Employee Self Service through DSU Online Services

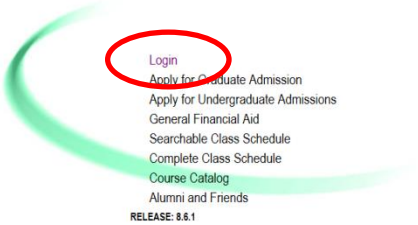
Employee Self Service can be accessed through the DSU website:

1. Open your internet browser on your computer.
2. Click on myDSU.
3. Click on Login under DSU online services.
4. Click on Login again to gain access to Employee Self Services.

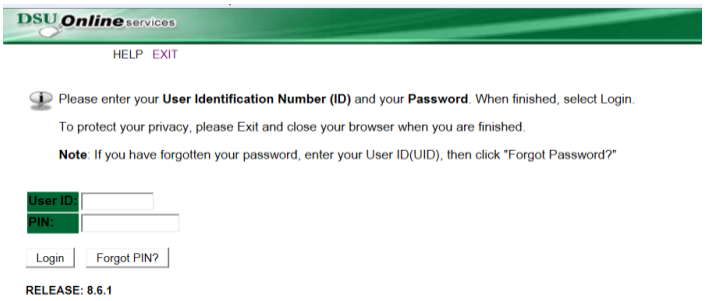




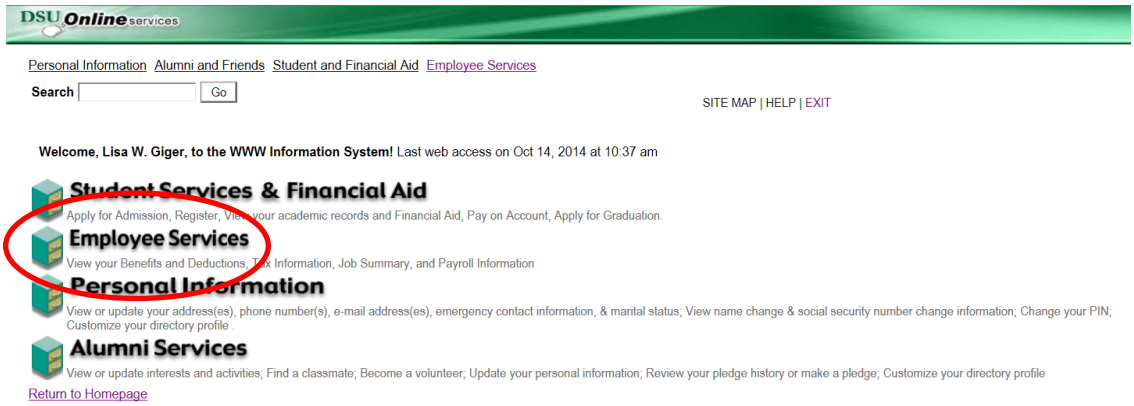




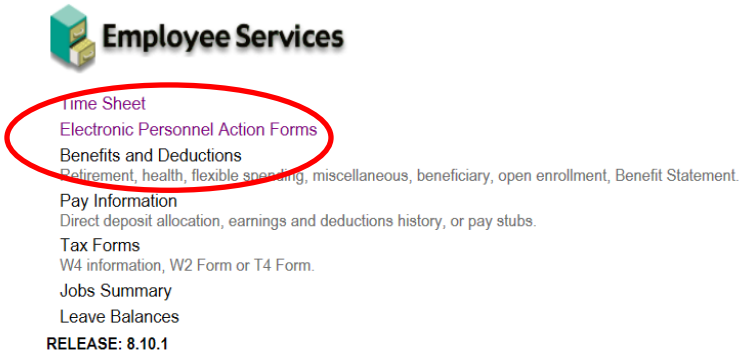
5. Enter your 900# and password.



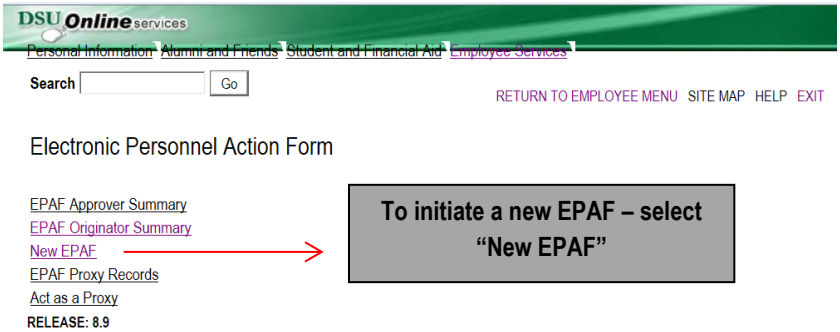
6. Click on Employee Services.



7. Click on Electronic Personnel Action Forms



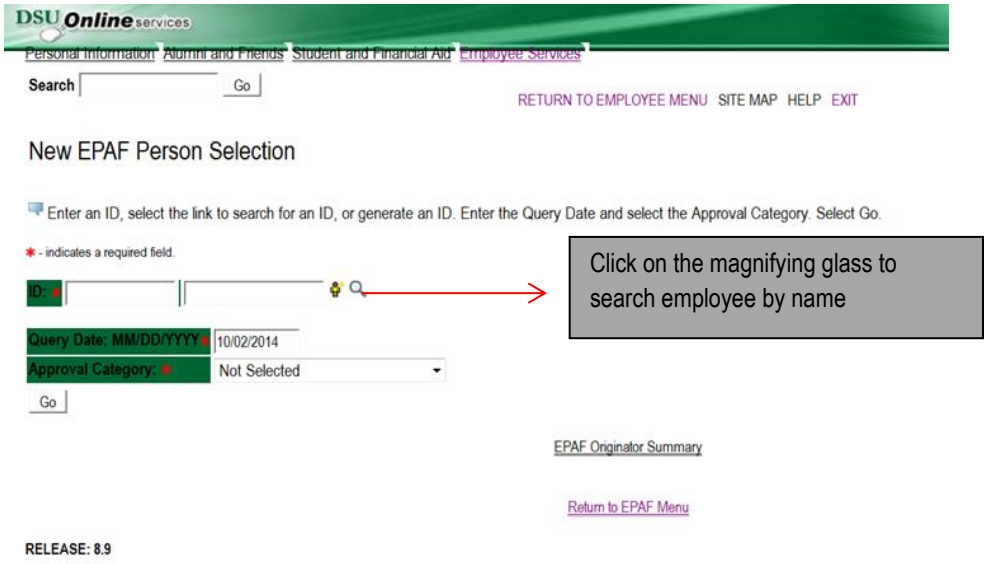
8. Click on New EPAF

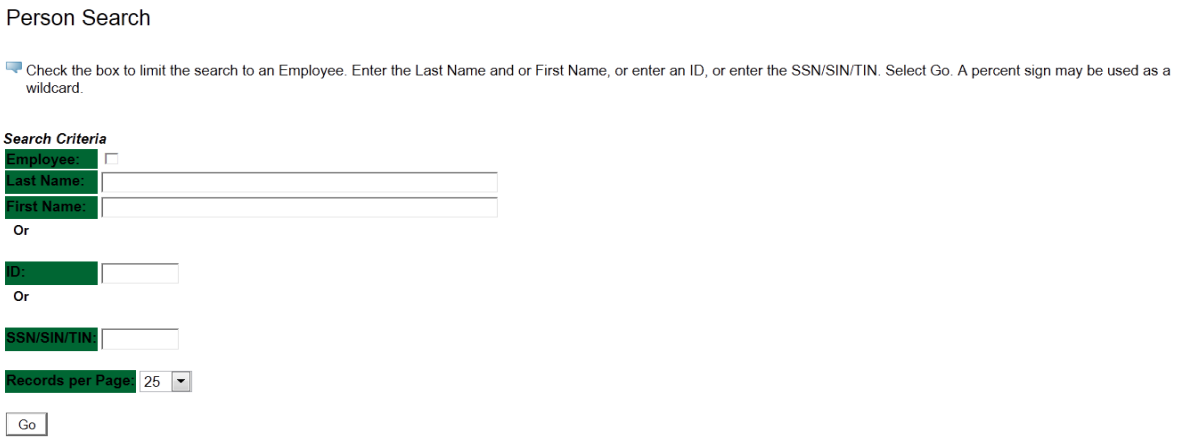


How to Search for a Person

Once you are logged into Employee Services and navigated to select the link to enter a new EPAF you will see the following web page. In this section you will learn to search for the person you want to conduct a transaction on.

When you do not know the 900 number you can search for it by pressing the magnifying glass icon next to the ID field.

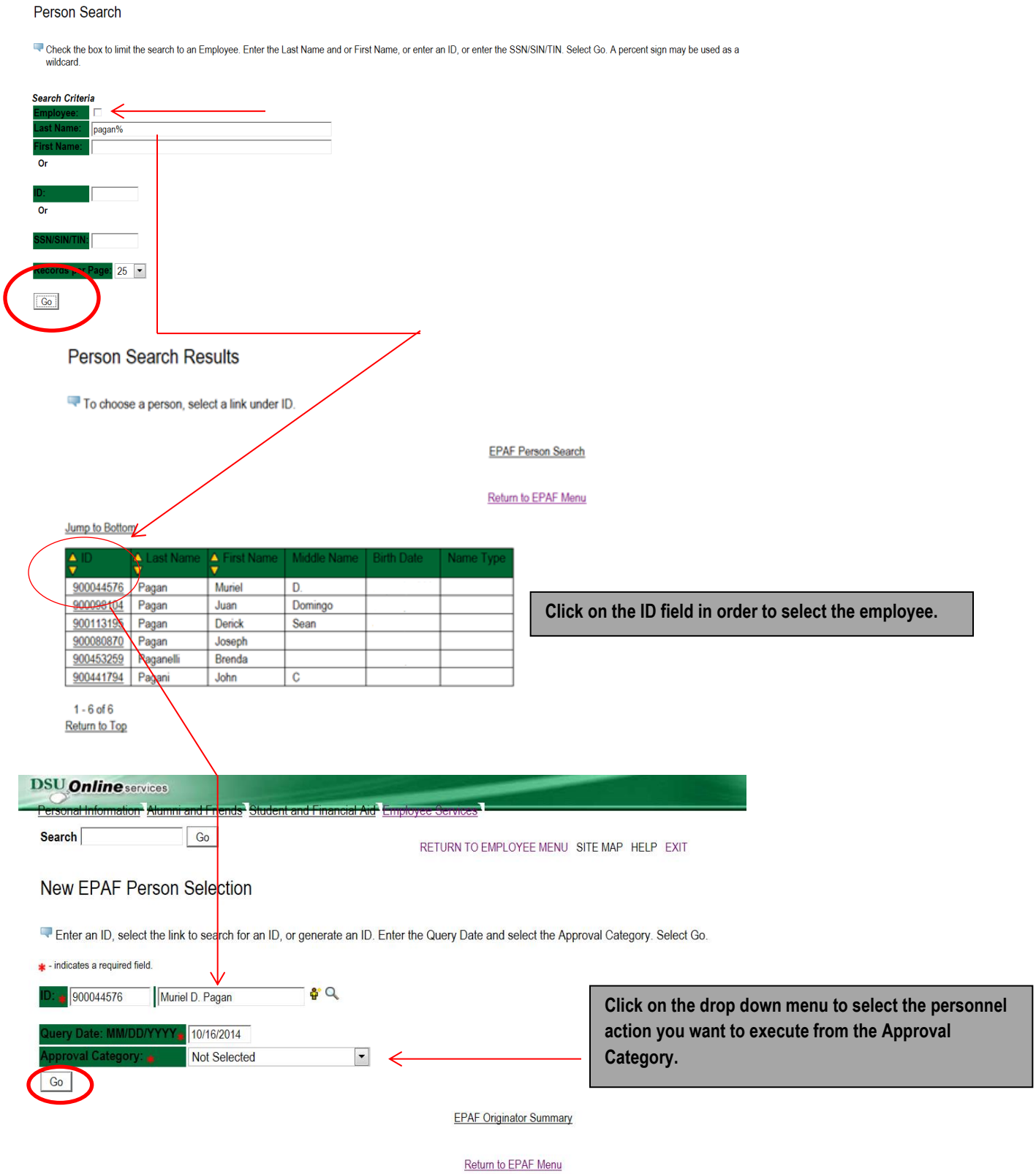




Once you have pressed the magnifying glass icon you will land at the above form. Notice that you can search in 3 different ways for the employee's record that you will want to perform changes to. You can search by "Name", "900 number", or "Social Security Number". After the search information has been entered, CLICK "Go".

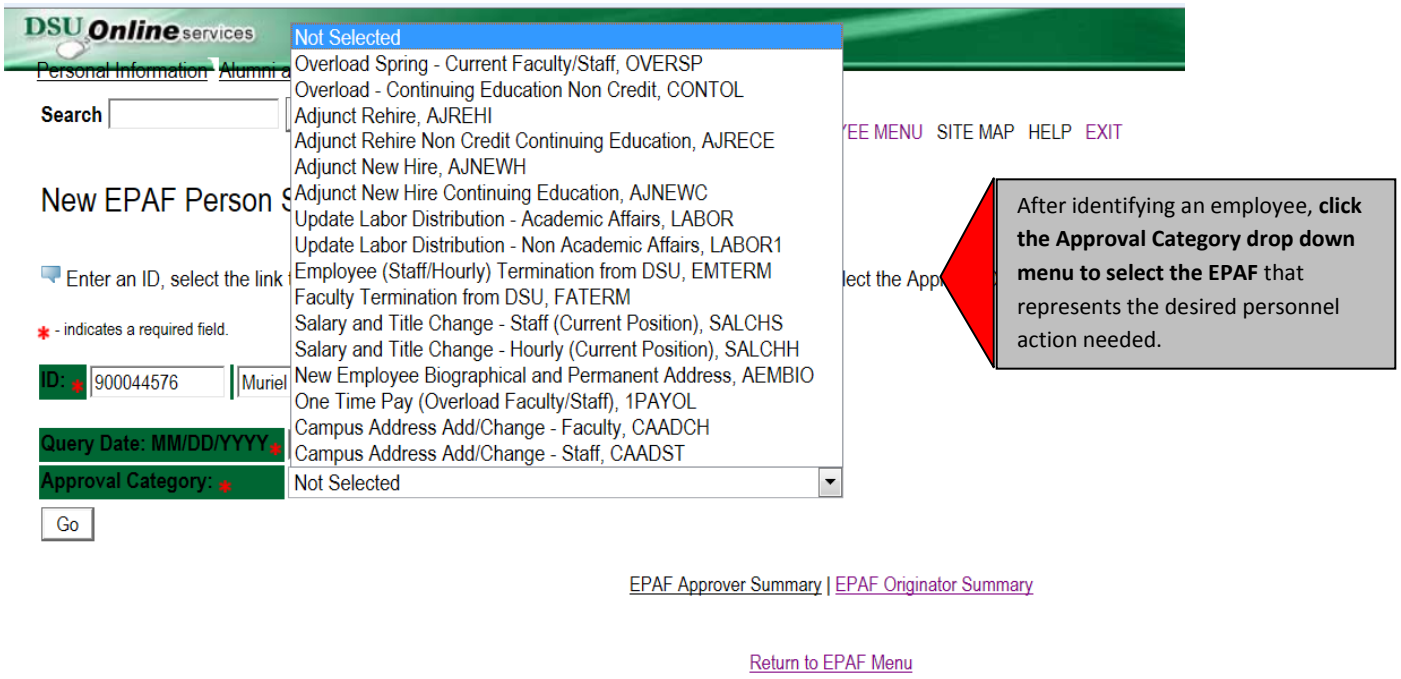
To search by using the name you can enter it in the fields provided then press the Go button. If you do not know the full name or don't know the proper spelling you can search by using a partial portion of their name. See the example below for how to enter a search using the **%** wild card search symbol. Click on "Go".

If the action is for an existing employee, click the "Employee" box to limit the search.

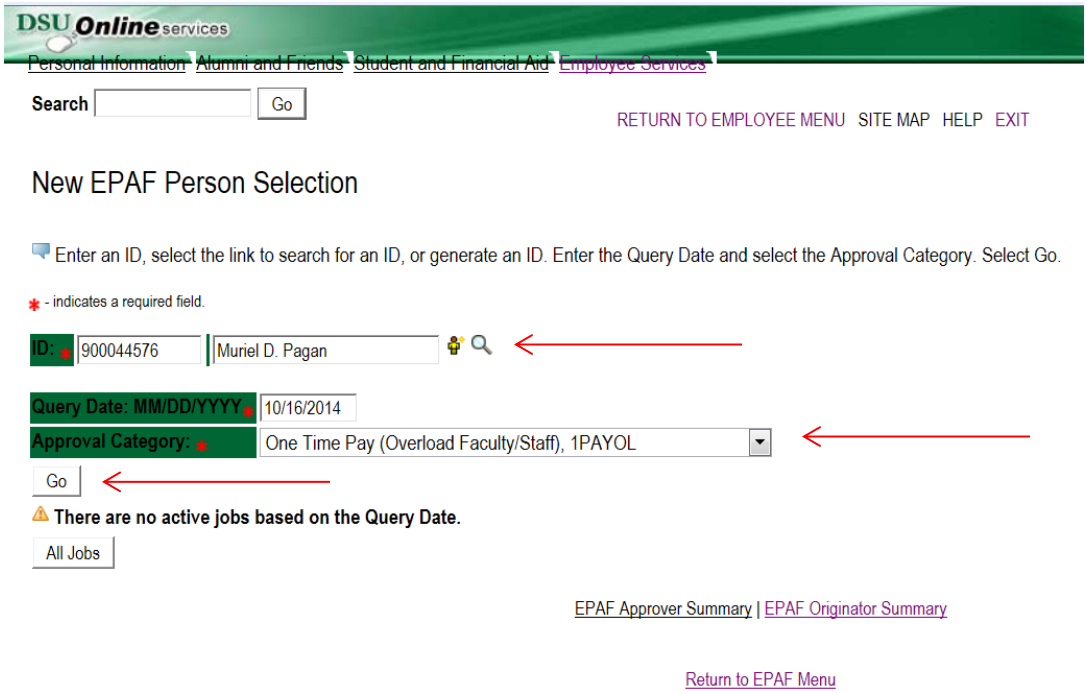


Now that you have searched and found the person you are performing a transaction on, select the EPAF that represents the personnel action you want to execute from the Approval Category drop down menu. Click on "Go".

Note: If the employee cannot be found you will not be able to perform any transaction at this time.



After identifying an employee, **click the Approval Category drop down menu to select the EPAF** that represents the desired personnel action needed.



Selecting the Applicable Approval Category

Once you have selected a valid employee you need to select the correct processing approval category to apply. Here is a definition of all currently used EPAF at DSU.

DSU EPAFS

#	Code	EPAF Approval Category	Description	Contact
1	D00001	Overload Pay	To pay a current DSU faculty/staff overload for teaching assignment during the fall and spring semesters – For Credit Courses only.	Human Resources
2	D00002	Overload Pay – Continuing Education	To pay a current DSU faculty/staff overload for teaching assignment during the fall and spring semesters – Courses taught through Continuing Education.	Human Resources
3	D00003	Adjunct Faculty Re-Appointment	To rehire an adjunct who has taught at DSU – For Credit Courses only.	Human Resources
4	D00004	Adjunct Faculty Re-Appointment – Continuing Education	To rehire an adjunct who has taught at DSU – Courses taught through Continuing Education.	Human Resources
5	D00040	Summer School Overload	To pay a current DSU faculty/staff overload for teaching assignment during the Summer School sessions – For Credit Courses only.	Human Resources
6	D00041	Summer School Overload – Continuing Education	To pay a current DSU faculty/staff overload for teaching assignment during the summer school sessions – Courses taught through Continuing Education.	Human Resources
7	D00042	Summer School Adjunct Re-Appointment	To rehire an adjunct who has taught at DSU – For Credit Courses for summer school only.	Human Resources
8	D00043	Summer School Adjunct Re-Appointment – Continuing Education	To rehire an adjunct who has taught at DSU – Courses taught through Continuing Education for summer school only.	Human Resources
9	D00044	Summer School Overload – Courses Taught During Over Sessions	To pay a current DSU faculty/staff overload for teaching assignment over BOTH summer school sessions – For Credit Courses only.	Human Resources
10	D00045	Summer School Overload – Continuing Education – Courses Over During Both Sessions	To pay a current DSU faculty/staff overload for teaching assignment during the summer school sessions – Courses taught through Continuing Education over BOTH summer school sessions.	Human Resources
11	D00046	Summer School Adjunct Re-Appointment – Courses Taught Over Both Sessions	To rehire an adjunct who has taught at DSU – For Credit Courses over BOTH summer school sessions.	Human Resources
12	D00047	Summer School Adjunct Re-Appointment – Continuing Education – Courses Taught Over Both Sessions	To rehire an adjunct who has taught at DSU – Courses taught through Continuing Education over BOTH summer school sessions.	Human Resources
13	D00007	One Time Payment – Extra Services (Non Academic Affairs)	To pay an employee additional pay for extra services performed outside their normal job duties.	Human Resources
14	D00008	One Time Payment – Extra Services (Academic Affairs)	To pay an employee additional pay for extra services performed outside their normal job duties.	Human Resources
15	D00009	Termination from DSU (Academic Affairs)	To end the employment of an employee who has resigned or been terminated.	Human Resources
16	D00010	Termination from DSU (Non Academic Affairs)	To end the employment of an employee who has resigned or been terminated.	Human Resources

17	D00011	Title and/or Salary Adjustment (Academic Affairs)	To change the title and/or salary of a staff member.	Human Resources
18	D00012	Title and/or Salary Adjustment (Non Academic Affairs)	To change the title and/or salary of a staff member.	Human Resources
19	D00013	Hourly Title and/or Rate Adjustment (Academic Affairs)	To change the title and/or hourly rate of pay of an hourly employee.	Human Resources
20	D00014	Hourly Title and/or Rate Adjustment (Non Academic Affairs)	To change the title and/or hourly rate of pay of an hourly employee.	Human Resources
21	D00015	Job Labor Distribution Change (Academic Affairs)	To change the fund, org, and/or account to which an employee's salary is charged	Human Resources
22	D00016	Job Labor Distribution Change (Non Academic Affairs)	To change the fund, org, and/or account to which an employee's salary is charged	Human Resources
23	D00022	Campus Address Change (Academic Affairs)	To change the campus address of an employee.	Human Resources
24	D00023	Campus Address Change (Non Academic Affairs)	To change the campus address of an employee.	Human Resources

How to Enter Routing Queue Manually

In this section you tell the system who will approve and apply the EPAF. To select a person click on the magnifying glass icon and select the appropriate approving manager for your department that is authoring this transaction. If they do not appear on this list, please contact your HR office for inclusion.

Some routing queues are pre-established and cannot be changed.

Charlotte Litton in Payroll is the only applier.

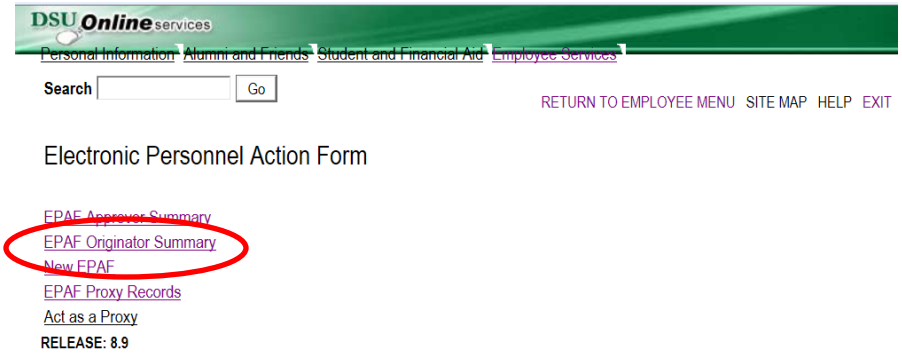
Routing Queue

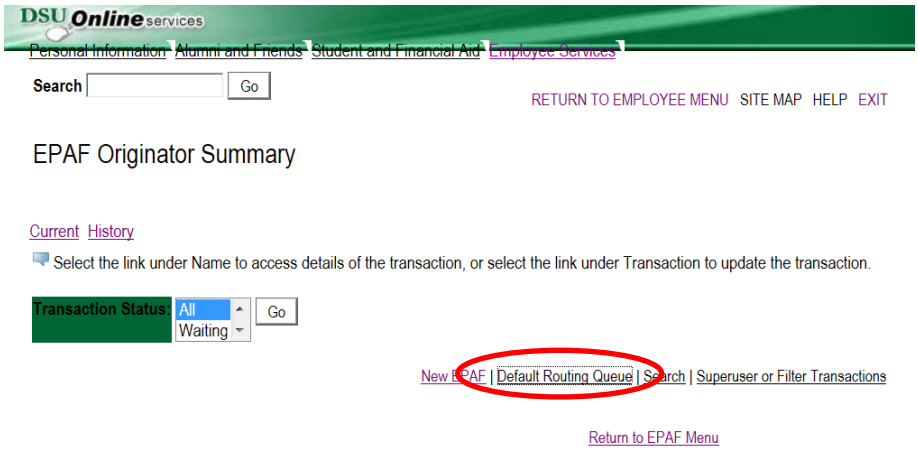
Approval Level	User Name		Required Action
90 - (HR) Human Resources	LGIGER	Lisa Weeks Giger	Approve
99 - (SUPER) Superuser	CLITTON	Charlotte M Litton	Apply
Not Selected			Not Selected
Not Selected			Not Selected

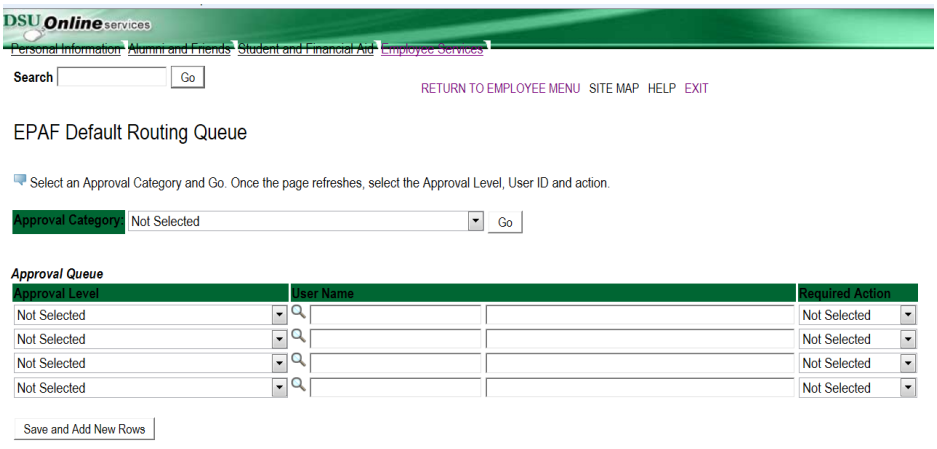
How to Create a Default Routing Queue

The next section is **setting up a default routing queue for your EPAFs**. In this section you define/tell the system which personnel will approve and apply each EPAF in advance.

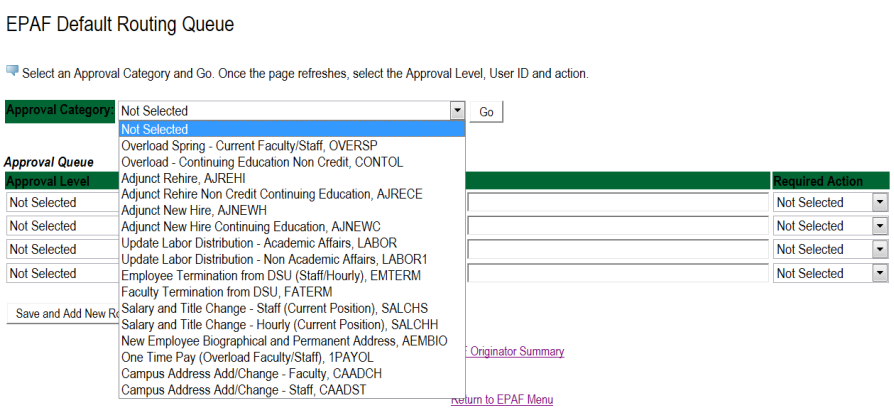
Once the EPAF is selected for a transaction, the routing queue will automatically populate with the pre define selections. To setup the default routing queue, **click on the EPAF Originator Summary from the main EPAF Menu. Once at the summary page click on the Default Routing Queue blue link** at the center of the screen above the EPAF transactions listing.







Once at the Default Routing Queue screen, **click the drop down menu and choose an EPAF** to predefine the Approval Queue.

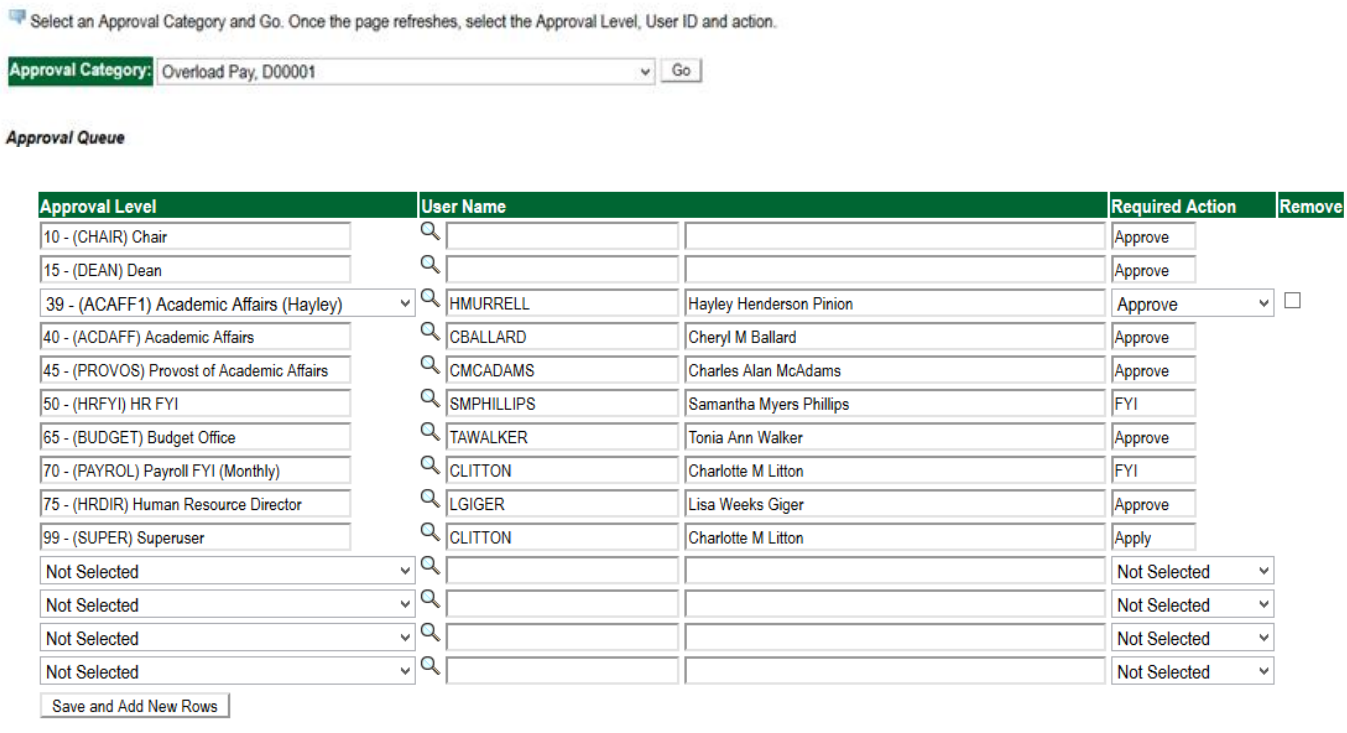


In the Approval Level column, **click the drop down menu to choose the level and category for each approval** need to process the action completely.

Once you have identified the level and category of the Approval Level needed, **click the magnifying class** 🔍 **to select the corresponding User Name for each approval level** identified and the Required Action for each User Name.

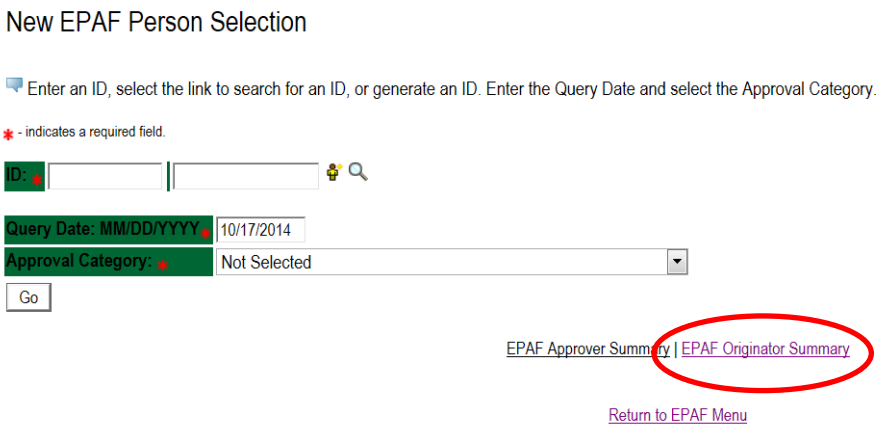
NOTE: The **system may mandate certain default approvers and appliers for all transactions,** such as Human Resource Approver, Human Resource Applier and Budget Approver.

EPAF Default Routing Queue



How to Review the History of Originators Transactions and Their Statuses

From the first web page you enter you will see the links to navigate. Click on the link labeled "EPAF Originator Summary" – see sample below.



You may look at your EPAF by transaction status by clicking on the Originator Summary link. From this point you can see their status. You can look at any of the details for any given employee in the list.

If you click on the person's name you will see the details entered. Note that you can void or delete this transaction. Delete will remove the process from the system and will not be processed. If you void it, the transaction detail is kept but will not be processed.

If you need to update this transaction you can do so by clicking the "Update" button. Once you update the transaction you must save and Submit again to process your changes. NOTE: this can be done until the transaction is approved. After that, only the approver can return the EPAF to you for correction and then you can update and resubmit.

EPAF Preview

✔ You are acting as an Originator.

Name and ID:	Rylee Cassandra Donovan, 900114402	**Job and Suffix:**	000003-00, Assistant Professor of Art
Transaction:	19	**Query Date:**	Oct 01, 2014
Transaction Status:	Waiting	**Last Paid Date:**	
Approval Category:	Update Labor Distribution - Academic Affairs, LABOR		

Next

Delete | Void | Update | Add Comment

Labor Distribution - Update if Needed, 000003-00 Assistant Professor of Art

Current

Effective Date: 10/01/2014

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	3006	61200	0101					100.00	

New

Effective Date: 10/01/2014

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	0305	61200	0101					.00	

Routing Queue

Approval Level	Name	Required Action	Queue Status	Action Date
Human Resources, 90	Lisa Weeks Giger, LGIGER	Approve	In the Queue	
Superuser, 99	Lisa Weeks Giger, LGIGER	Apply	In the Queue	

Transaction History

Action	Date	User Name
Created:	Oct 06, 2014	Lisa Weeks Giger

How to Process an Overload Pay and Overload Pay (Continuing Education)

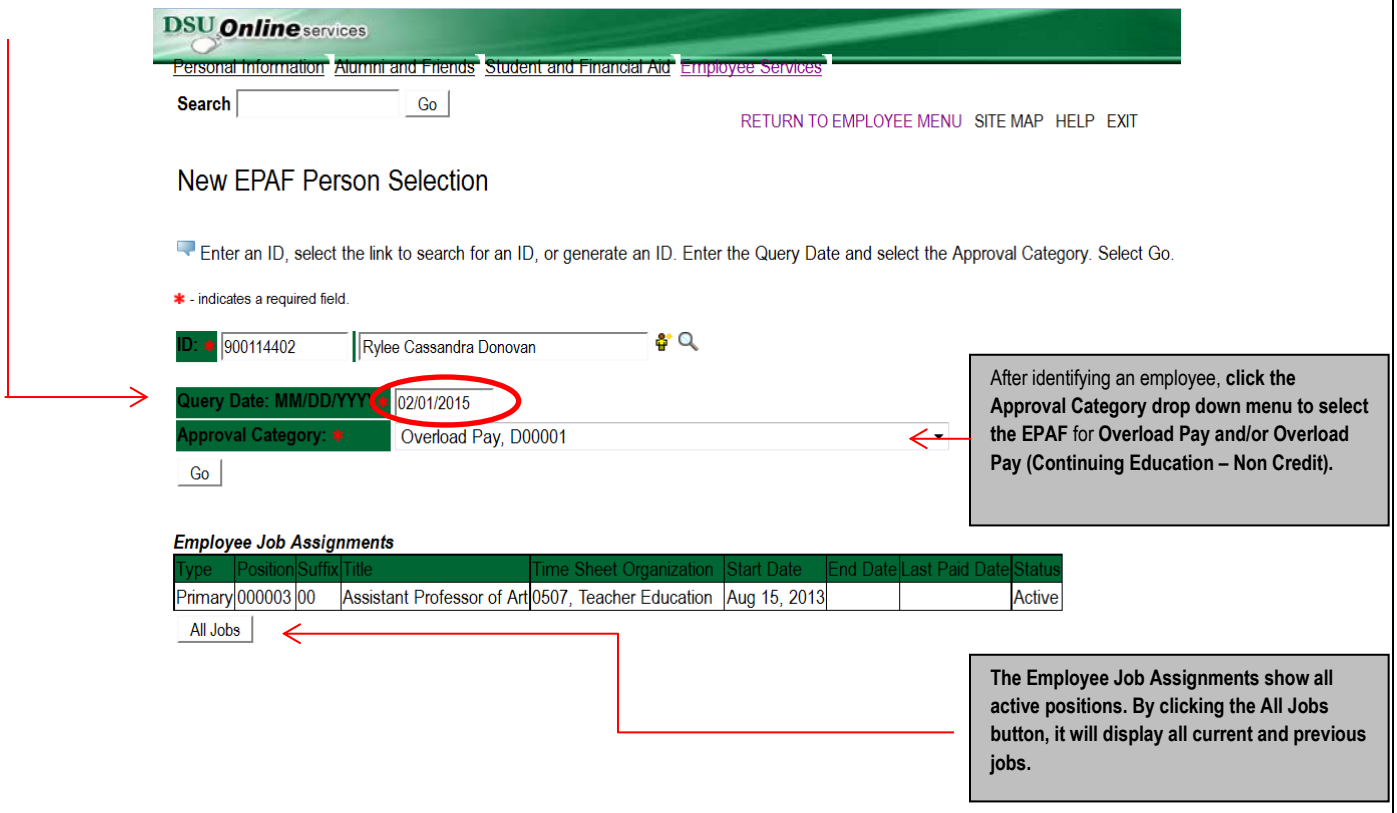
Log into Employee Self Service and choose **ELECTRONIC PERSONNEL ACTION FORMS** and then **NEW EPAF.**

This EPAF should be used to process an overload for current faculty/staff employees and for adjuncts, which already have an active job for the semester. The steps below should be followed:

1. Enter the employee's 900# or click on the magnifying glass to search for an employee's 900#.
2. The query date will default to today's date. Change the query date to:
   - Fall Semester: **09/01/2020 or 09/01/20__**
   - Spring Semester: **02/01/2021 or 02/01/20__**
3. Select **Overload Pay or Overload Pay (Continuing Education)** from the drop down approval category box.

!!! IMPORTANT !!!

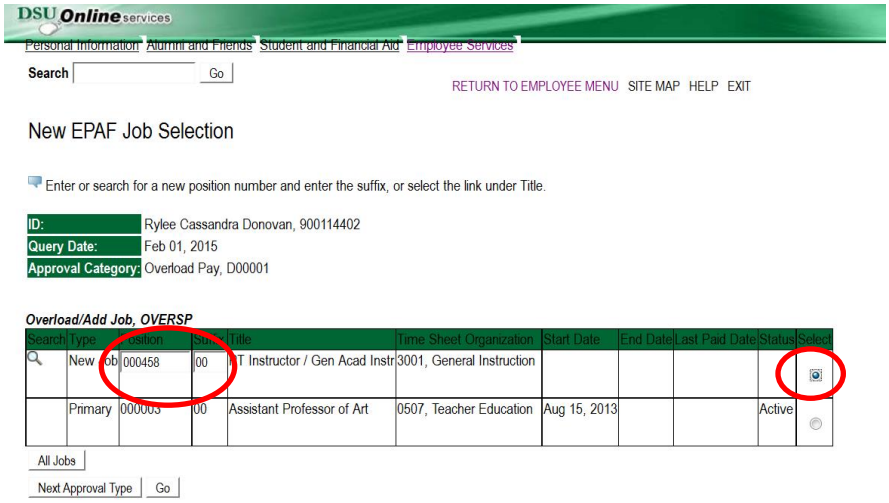
MAKE SURE THE QUERY DATE IS SET TO THE DATE YOU WANT THE TRANSACTION TO TAKE PLACE. IF IT IS NOT SET TO THE CORRECT DATE (LISTED ABOVE), IT WILL CAUSE AN ERROR AND YOU WILL HAVE TO RESTART THE EPAF.



4. Click on "Go" to begin the Overload Pay and/or Overload Pay (Continuing Education – Non Credit) EPAF.

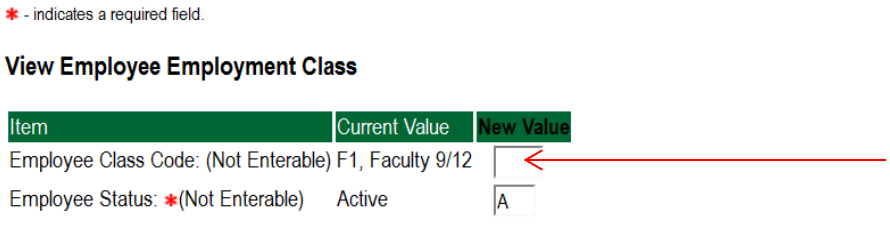
5. Enter the correct position numbers in the format indicated below and click on "GO". If a position number has already been assigned to the employee, select the radial dial at the end of the line and click on "GO". **It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.**

Position #:	Suffix #:	Description
000458	00	Overloads paid for *credit hour* courses.
004025	00	Overloads paid by other funds (not grants). The fund #s usually start with 108.
004030	00	Overloads paid by grant funding. The fund #s usually start with 3.
000478	00	Overloads paid by Continuing Education. The section numbers will start with a "c". Example: Section c21

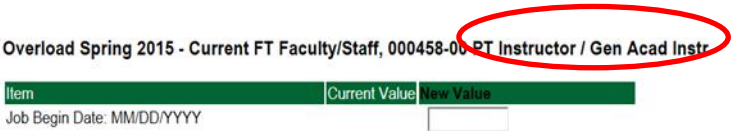
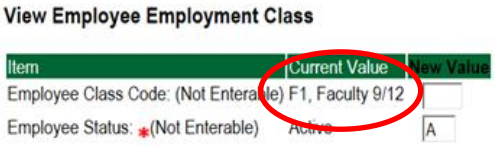


6. View Employee Class:
   - This section allows the originator to view the current employee's employment information.
   - Employment Status must equal (A) – Active.
   - If employment status is listed something else other than Active, do not use this EPAF.
   - Listed below are the definitions of the Employee Class Code
   - *These fields are not able to be changed.*

Employee Class Description	Employee Class Definition	Payroll ID
F1, Faculty 9/12	Faculty employee employed for 9 months and paid over 12 months	M1 payroll
F2, Faculty 9/9	Faculty employee employed for 9 months and paid over 9 months	M2 payroll
F4, Faculty 12/12	Faculty employee employed for 12 months and paid over 12 months	M1 payroll
S1, Full Time Staff	Staff employee employed for 12 months and paid over 12 months	M1 payroll
F3, Faculty PT < 9 months	Adjunct faculty	Do not used this EPAF



7. Enter Overload Pay Information

Field	Statement/Action	Action/Example
Job Begin Date:	If statement below says "Last Paid Date:"….then →	Leave field blank
	If statement below says "PT Instructor/Gen Acad Instr", ….then → 	Enter: (enter corresponding year) 09/01/20__ for Fall Semester 02/01/20__ for Spring Semester
Job Effective Date:	Field cannot be changed. Information is defaulted.	
Job Personnel Date:	Field cannot be changed. Information is defaulted.	
Title:	Enter the course information for the overload that is being paid.	Example: Overload ENG 101
Annual Salary:	Total amount to be paid for course overloads	3000.00
FTE:	FTE for overload is calculated as follows: .25 = 1 course overload .75 = 3 course overload .50 = 2 course overload 1.00 = 4 course overload To figure FTE divide the amount to be paid by 12,000 Example: $300/$12,000 = .025	Enter the number FTE for the number of course overloads: Example: .25
Contract Type	Field cannot be changed. Information is defaulted.	
Employee Class Code	Field cannot be changed. Information is defaulted.	
Payroll ID	Payroll ID will default to M1. Field can be change. If the employee class under the "View Employee Employment Class" is F1, F4, or S1….then →	Payroll ID M1 should remain defaulted.
	If the employee class under the "View Employee Employment Class" is F2….then → 	Use the drop down box to change to M2.
Leave Rept Pay ID	The Leave Report Pay ID should match the Payroll ID above.	Match Leave Rept Pay ID to Payroll ID (either M1 or M2)
Job Change Reason	Field cannot be changed. Information is defaulted.	
Step	Field cannot be changed. Information is defaulted.	
Job Status	Field cannot be changed. Information is defaulted.	

Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 PT Instructor / Gen Acad Instr

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		02/01/2015
Personnel Date: MM/DD/YYYY(Not Enterable)		02/01/2015
Title: *		Overload
Annual Salary: *		
FTE: *		
Contract Type: (Not Enterable)		O
Employee Class Code: *(Not Enterable)		F3
Payroll Id: *		M1, Monthly
Leave Rept Pay ID: *		M1, Monthly
Job Change Reason: (Not Enterable)		OVER
Step: (Not Enterable)		0
Job Status: (Not Enterable)		A

View Employee Employment Class

Item	Current Value	New Value
Employee Class Code: (Not Enterable)	F1, Faculty 9/12	
Employee Status: *(Not Enterable)	Active	A

8. Update Factor, Pays, and Hours

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Update Factors, Pays, and Hours, 000458-00 Overload ENG 101, Last Paid Date: May 31, 2014

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		02/01/2015
Factor: (Not Enterable)		4
Pays: (Not Enterable)		4
Hours per Pay: (Not Enterable)		84

No Action Needed

9. Terminate Employee Job

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Terminate Employee Job, 000458-00 Overload ENG 101, Last Paid Date: May 31, 2014

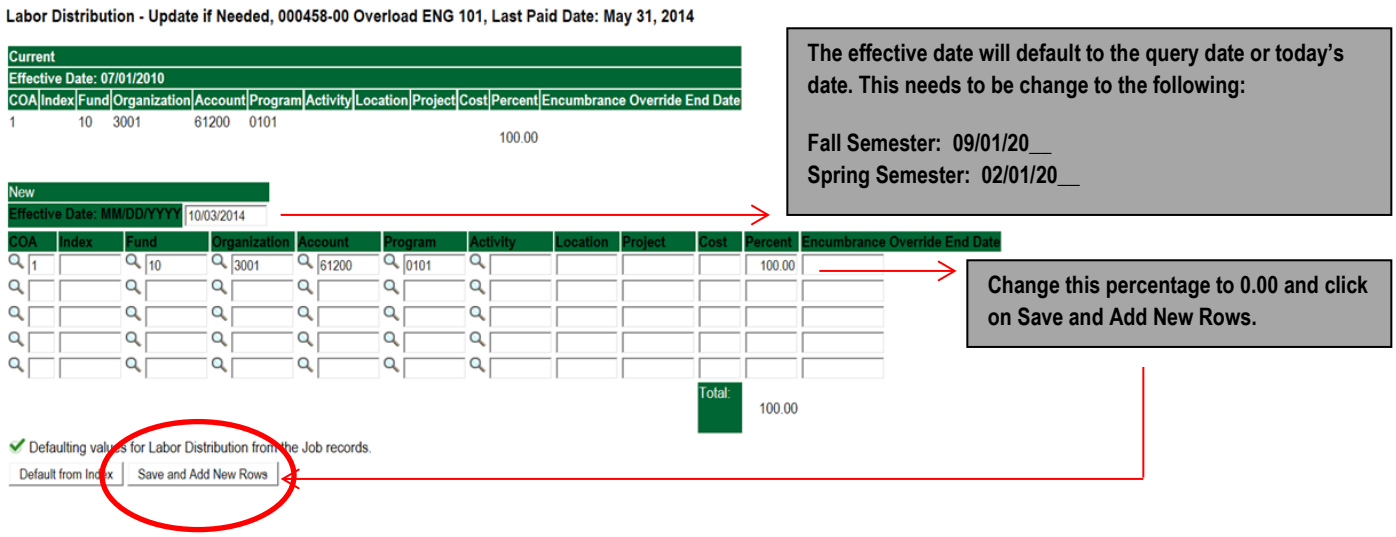
Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)		05/31/2015
Job Status: *(Not Enterable)		T
Job Change Reason: *(Not Enterable)		JBEND

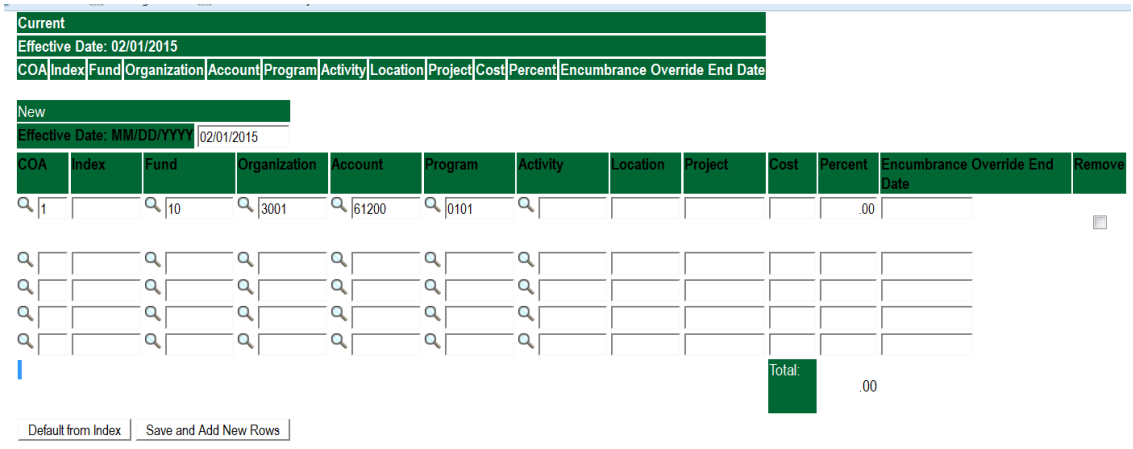
No Action Needed

10. **Labor Distribution – Update if Needed**
    - In the "CURRENT" section – the current labor codes and the effective date of the last change will default into the form.
    - In the "NEW" section – add new rows or make changes to the existing rows.
    - Changes to the accounting information will be LIMITED. The correct accounting information should default in the field according to the position number being used.
    - The fund, organization, account, and program codes will NOT need to be change unless payment is being charged by grant or other funds.
    - EFFECTIVE DATE: The effective date should equal either: 09/01/20__ (Fall) or 02/01/20__ (Spring) depending on the semester.
    - Apply the appropriate changes to the field if necessary.

Steps to change Labor Distributions

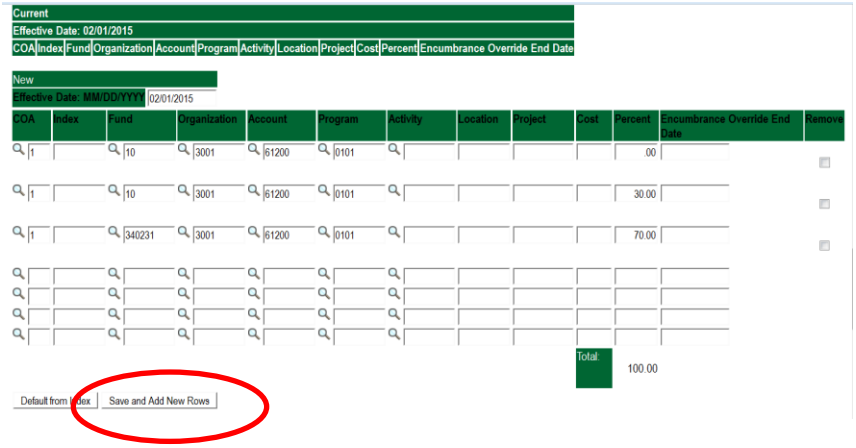
1. Change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.





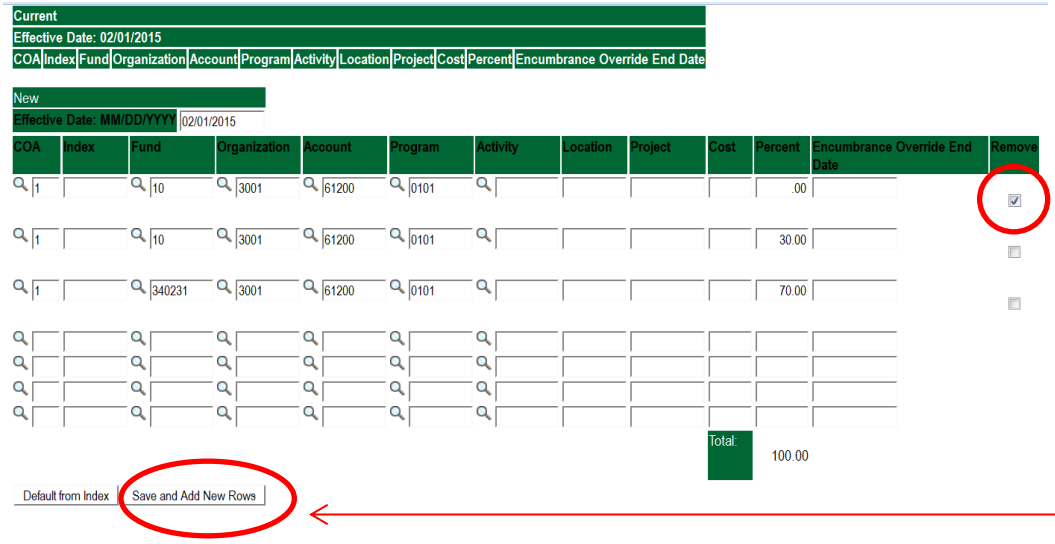
2. Enter the new accounting information. The following must be entered for each line.
    a. COA = enter 1.
    b. Fund No.
    c. Organization No.
    d. Account No. = 61200
    e. Percentage = totals must equal 100%. See sample below

Click to "Save and Add New Rows"

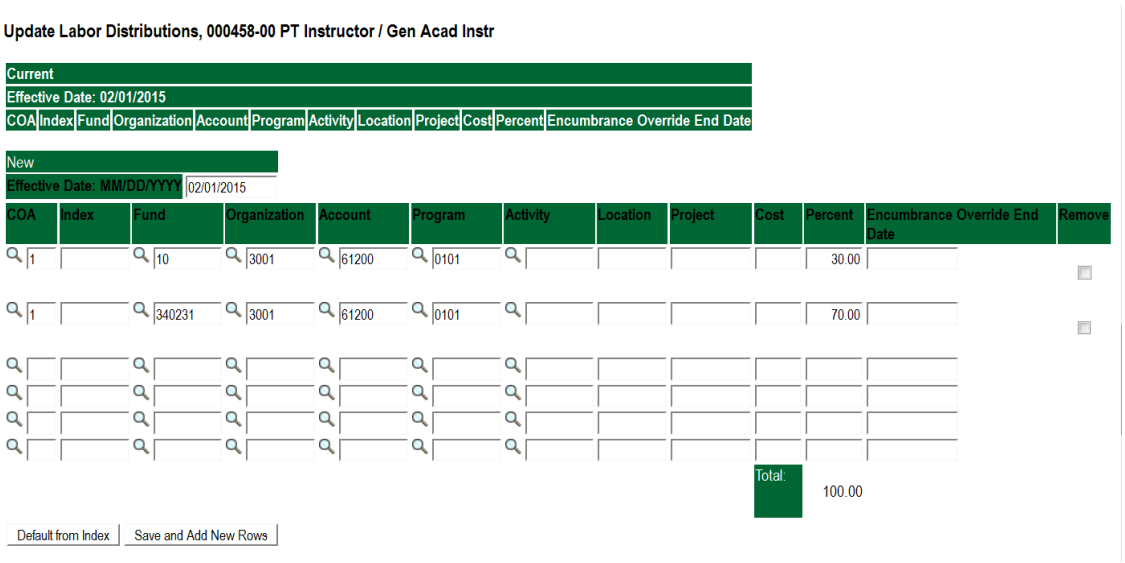


Enter COA, Fund #, Org#, and Account# and percentage. Be sure percentages = 100%.

3. Click on the box under the "Remove" Column to remove the old accounting information. The percentage should be set 0.00%.
4. Click on Save and Add New Rows. The old accounting information should be removed.



Click the remove button on the line that has 0.00% entered. Then click on "Save and Add New Rows.



11. Routing Queue

- In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- For Overloads, **all EPAFs must have a Chair and Dean level approval.**
- For Grants, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office**. Other approval levels will default.
- For Continuing Education courses, add **Dean, Graduate and Continuing Education and Continuing Education (Marilyn Read).**

Routing Queue

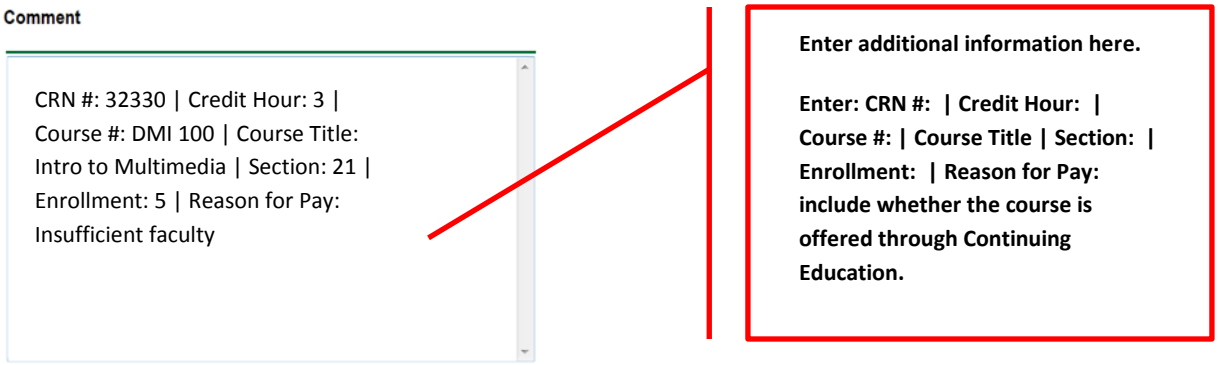
Approval Level	User Name		Required Action	Remove
10 - (CHAIR) Chair			Approve	
15 - (DEAN) Dean			Approve	
39 - (ACAFF1) Academic Affairs (Hayley)	HMURRELL	Hayley Henderson Pinion	Approve	☐
40 - (ACDAFF) Academic Affairs	CBALLARD	Cheryl M Ballard	Approve	
45 - (PROVOS) Provost of Academic Affairs	CMCADAMS	Charles Alan McAdams	Approve	
50 - (HRFYI) HR FYI	SMPHILLIPS	Samantha Myers Phillips	FYI	
65 - (BUDGET) Budget Office	TAWALKER	Tonia Ann Walker	Approve	
70 - (PAYROL) Payroll FYI (Monthly)	CLITTON	Charlotte M Litton	FYI	
75 - (HRDIR) Human Resource Director	LGIGER	Lisa Weeks Giger	Approve	
99 - (SUPER) Superuser	CLITTON	Charlotte M Litton	Apply	
Not Selected			Not Selected	
Not Selected			Not Selected	
Not Selected			Not Selected	
Not Selected			Not Selected	

Save and Add New Rows

12. Click on the **"Save and Add New Rows".**

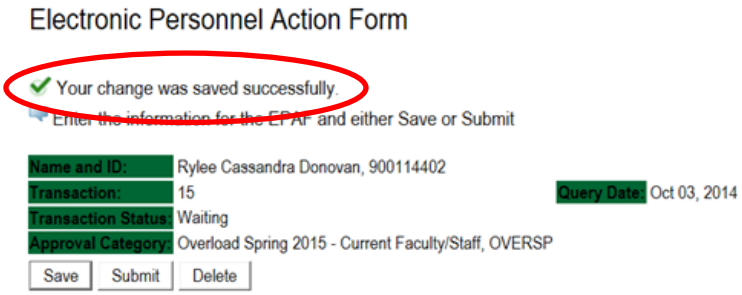
13. Comments

- In the "Comments" section, enter comments for the approvers with an explanation for the action.
- In the "Comment" section, also enter the following for overload information:
  - CRN #:
  - Credit Hour:
  - Course Number:
  - Course Title:
  - Section:
  - Enrollment:
  - Reason for Overload:



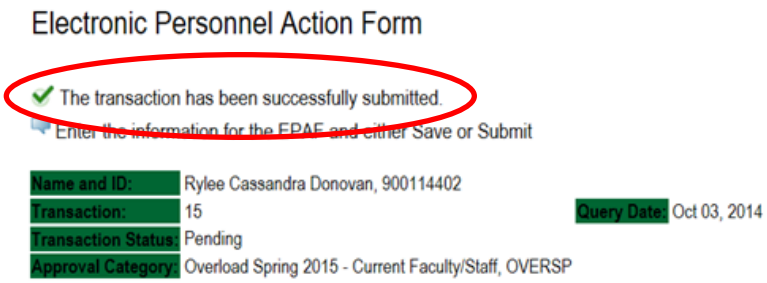
14. Save EPAF

- Hit the "Save" Button at the bottom of the form.
- Return to the top of the form.
- The message should display – **"Your change was saved successfully."**
- Check your date entry



15. Submit EPAF

- Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
- The EPAF automatically routes to the approvers in the order of their approval levels.



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Errors and Warning Messages

Type	Message Type	Description
Add Employee Job	WARNING	*WARNING* This employee is terminated on the Employee Form.
Add Employee Job	WARNING	*WARNING* The Employee's Term Date and Reason should be removed from PEAEMPL.
Add Employee Job	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
Update Factors, Pays and Hours	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.

* - indicates a required field.

Delete

If an EPAF needs to be re-started, click on the “Delete” button. This will delete the transaction and allow you to start over.

How to Process an Adjunct Rehire and Adjunct Rehire (Continuing Education)

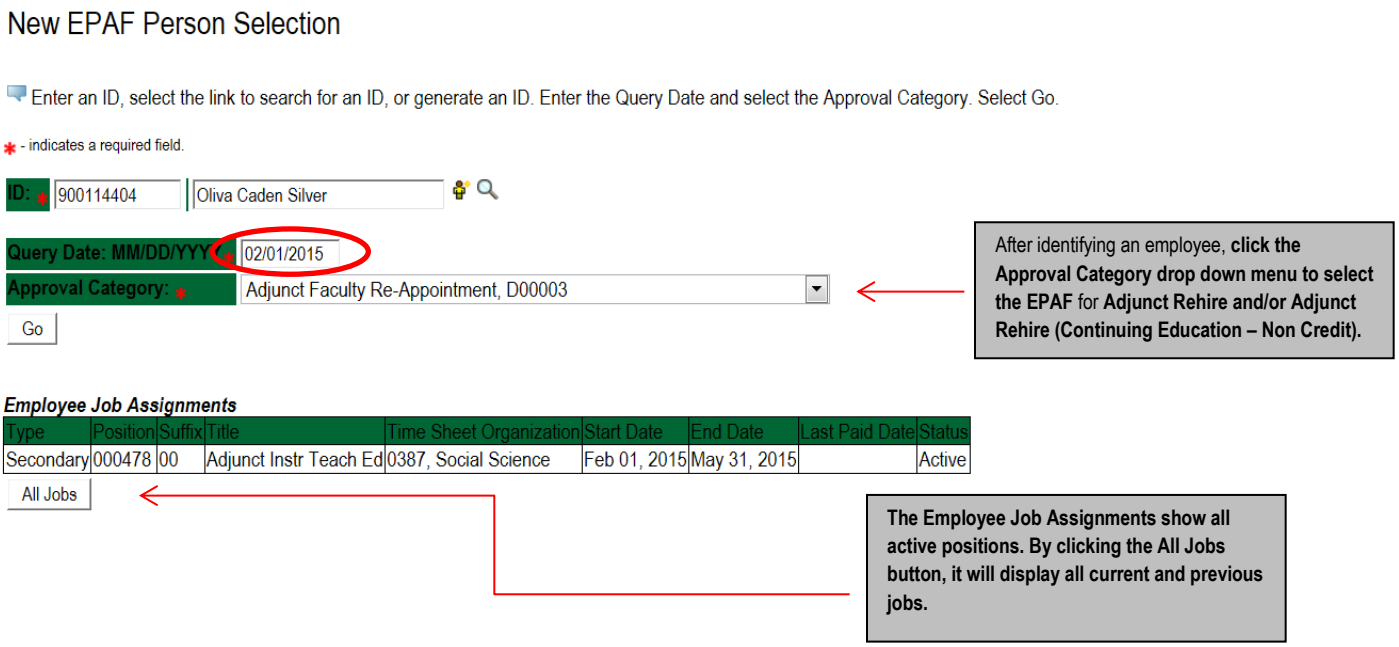
Log into Employee Self Service and choose **ELECTRONIC PERSONNEL ACTION FORMS** and then **NEW EPAF.**

This EPAF should be used to rehire an adjunct. The steps below should be followed:

1. Enter the employee's 900# or click on the magnifying glass to search for an employee's 900#.
2. The query date will default to today's date. Change the query date to:
   - Fall Semester: **09/01/2020 or 09/01/20__**
   - Spring Semester: **02/01/2021 or 02/01/20__**
3. Select **Adjunct Rehire** or **Adjunct Rehire (Continuing Education)** from the drop down approval category box.

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DATE YOU WANT THE TRANSACTION TO TAKE PLACE. IF IT IS NOT SET TO THE CORRECT DATE (LISTED ABOVE), IT WILL CAUSE AN ERROR AND YOU WILL HAVE TO RESTART THE EPAF.

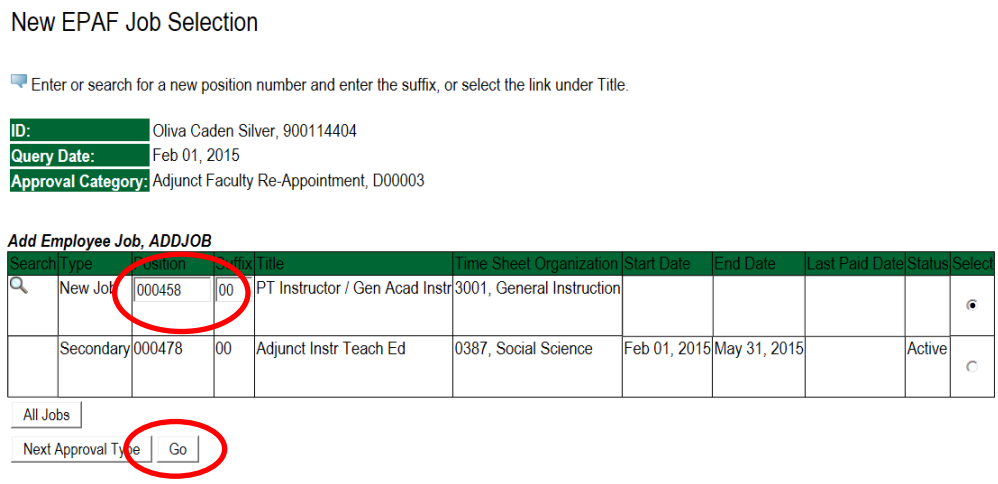


4. Click on "Go" to begin the Adjunct Rehire and/or Adjunct Rehire (Continuing Education – Non Credit) EPAF.
5. Click on the button **"All Jobs".**
6. Select the position in which to reactivate by clicking on the radial dial at the end of the row. The position to reactivate will usually be position 000458 for credit courses and 000478 for Continuing Education – Non Credit courses. The position to be reactivated will usually be the primary type.

7. If the employee does not have a job with the correct position number, then enter the position number in the format indicated below and click on "GO". **It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.**

Position #:	Suffix #:	Description
000458	00	Overloads paid for *credit hour* courses.
004025	00	Overloads paid by other funds (not grants). The fund #s usually start with 108.
004030	00	Overloads paid by grant funding. The fund #s usually start with 3.
000478	00	Overloads paid by Continuing Education. The section numbers will start with a "c". Example: Section c21. This is the only job that would use the Continuing Education option.
001339	00	Dual Credit Instructors. The section numbers start with D. Example D01. Use Adjunct Rehire. These are paid out of Fund 10 Org 4079

To Add a New Position – Screen Shot



New EPAF Job Selection

Enter or search for a new position number and enter the suffix, or select the link under Title.

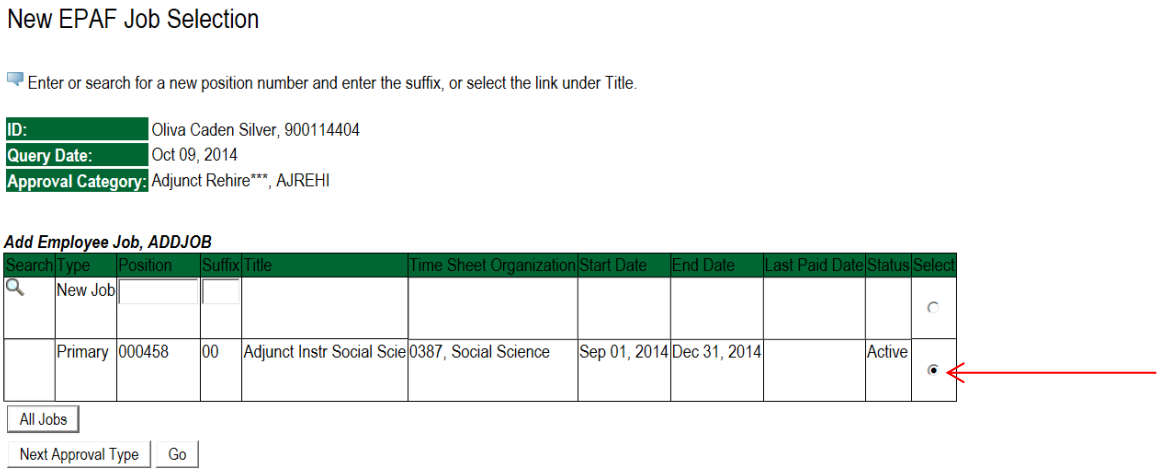
ID:	Oliva Caden Silver, 900114404
Query Date:	Feb 01, 2015
Approval Category:	Adjunct Faculty Re-Appointment, D00003

Add Employee Job, ADDJOB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job	000458	00	PT Instructor / Gen Acad Instr	3001, General Instruction					
	Secondary	000478	00	Adjunct Instr Teach Ed	0387, Social Science	Feb 01, 2015	May 31, 2015		Active	

All Jobs | Next Approval Type | Go

To Re-activate a Position – Screen Shot



New EPAF Job Selection

Enter or search for a new position number and enter the suffix, or select the link under Title.

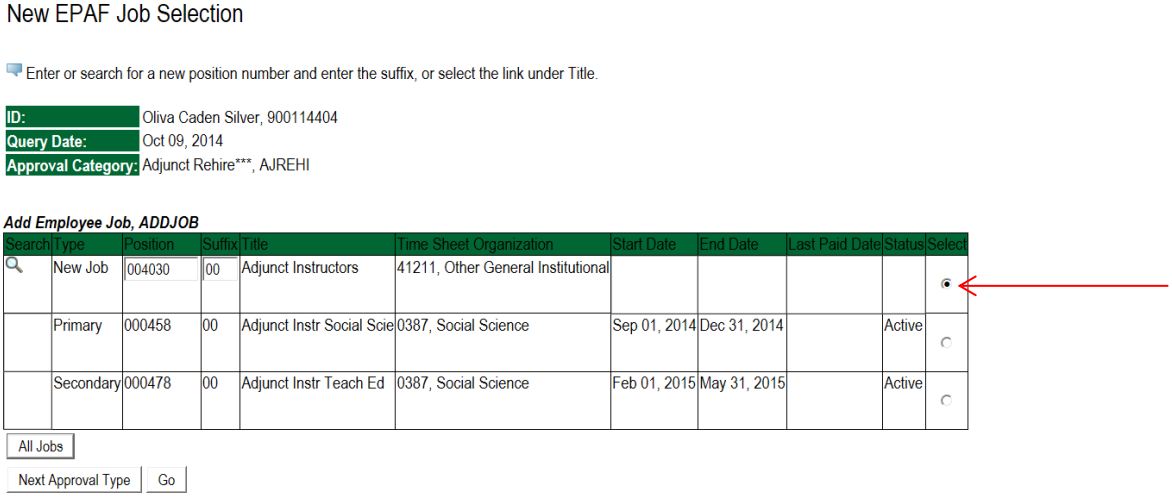
ID:	Oliva Caden Silver, 900114404
Query Date:	Oct 09, 2014
Approval Category:	Adjunct Rehire***, AJREHI

Add Employee Job, ADDJOB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									
	Primary	000458	00	Adjunct Instr Social Scie	0387, Social Science	Sep 01, 2014	Dec 31, 2014		Active	

All Jobs | Next Approval Type | Go

To Activate a Grant Position – Screen Shot



New EPAF Job Selection

Enter or search for a new position number and enter the suffix, or select the link under Title.

ID:	Oliva Caden Silver, 900114404
Query Date:	Oct 09, 2014
Approval Category:	Adjunct Rehire***, AJREHI

Add Employee Job, ADDJOB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job	004030	00	Adjunct Instructors	41211, Other General Institutional					
	Primary	000458	00	Adjunct Instr Social Scie	0387, Social Science	Sep 01, 2014	Dec 31, 2014		Active	
	Secondary	000478	00	Adjunct Instr Teach Ed	0387, Social Science	Feb 01, 2015	May 31, 2015		Active	

All Jobs | Next Approval Type | Go

Enter Adjunct Employment Record – See table below for instructions.

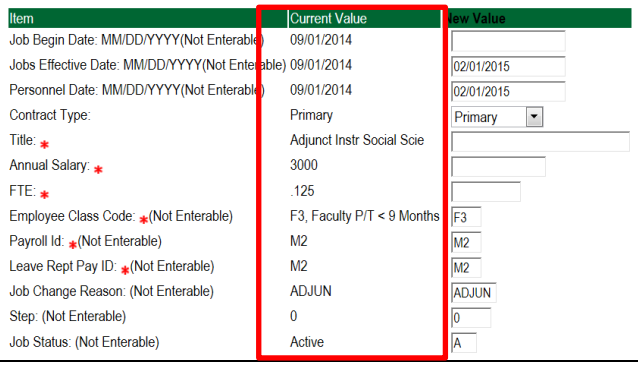
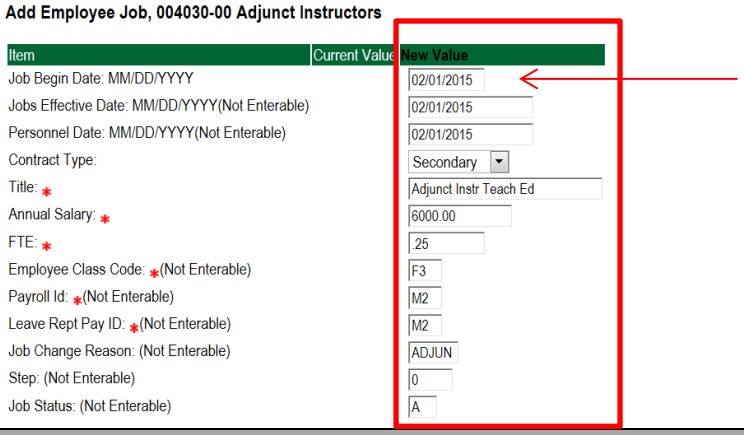
Field	Statement/Action	Action/Example
Home Organization	Change if needed. A change is usually not needed	0387
Distribution Org	Change if needed. If Home organization is changed, then distribution org must match home org.	
Current Hire Date	Field cannot be changed. Information is defaulted.	No action needed
Employee Status	Field cannot be changed. Information is defaulted.	No action needed
Employee Class Code	Enter the following if needed: (Usually a change is not needed) F3=adjunct employee RT=reemployment of PERS retiree	F3
Home COAS	Field cannot be changed. Information is defaulted.	No action needed
Term Reason Code:	Field cannot be changed. Information is defaulted.	No action needed
Terminate Date:	Field cannot be changed. Information is defaulted.	No action needed
Last Work Date:	Field cannot be changed. Information is defaulted.	No action needed

An * is a required field.

Adjunct Employment Record

Item	Current Value	New Value
Home Organization:	0387, Social Science	
Distribution Orgn:	0387, Social Science	
Current Hire Date: MM/DD/YYYY(Not Enterable)	09/01/2014	
Employee Status: *(Not Enterable)	Terminated	A
Employee Class Code:	F3, Faculty P/T < 9 Months	
Home COAS: *(Not Enterable)	1	1
Term Reason Code: *(Not Enterable)	JE, Job ends	JE
Termination Date: MM/DD/YYYY*(Not Enterable)	12/31/2014	05/31/2015
Last Work Date: MM/DD/YYYY*(Not Enterable)		-

8. Add Employee Job – See table below for instructions

Field	Statement/Action	Action/Example
Job Begin Date:	In the Current Value Column, if the current information is population, then → **Add Employee Job, 000458-00 Adjunct Instr Social Scie** 	Leave field blank
	To Add Position Number: If Adjunct has not been employed in a position (the Current Value Column will be blank), then enter the following in the Job Begin Date Field: Fall Semester: 09/01/20__ Spring Semester: 02/01/20__ **Add Employee Job, 004030-00 Adjunct Instructors** 	Enter: (enter corresponding year) 09/01/20__ for Fall Semester 02/01/20__ for Spring Semester
Job Effective Date:	Field cannot be changed. Information is defaulted.	
Job Personnel Date:	Field cannot be changed. Information is defaulted.	
Contract Type:	Field is defaulted to primary, If error occurs then change contract type to Secondary.	
Title:	Enter title as: Adjunct Instructor in _____. Title may have to be abbreviated Dual Credit instructors title: Dual Enrollment Instructor	- Adj Instr Social Sci - Dual Enrollment Inst
Annual Salary:	Total amount to be paid for course overloads	3000.00
FTE:	FTE for overload & adjunct teaching is calculated as follows: .25 = 1 course overload .75 = 3 course overload .50 = 2 course overload 1.00 = 4 course overload To figure FTE divide the amount to be paid by 12,000 Example: $3000/$12,000 = .25	Enter the number FTE for the number of course overloads: Example: .25
Contract Type	Field cannot be changed. Information is defaulted.	
Employee Class Code	Field cannot be changed. Information is defaulted.	
Payroll ID	Field cannot be changed. Information is defaulted.	
Leave Rept Pay ID	Field cannot be changed. Information is defaulted.	Match Leave Rept Pay ID to Payroll ID
Job Change Reason	Field cannot be changed. Information is defaulted.	
Step	Field cannot be changed. Information is defaulted.	
Job Status	Field cannot be changed. Information is defaulted.	

Add Employee Job, 000458-00 Adjunct Instr Social Scie

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	09/01/2014	
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	09/01/2014	02/01/2015
Personnel Date: MM/DD/YYYY(Not Enterable)	09/01/2014	02/01/2015
Contract Type:	Primary	Primary
Title: *	Adjunct Instr Social Scie	Adjunct Instr Social Sci
Annual Salary: *	3000	3000.00
FTE: *	.125	.125
Employee Class Code: *(Not Enterable)	F3, Faculty P/T < 9 Months	F3
Payroll Id: *(Not Enterable)	M2	M2
Leave Rept Pay ID: *(Not Enterable)	M2	M2
Job Change Reason: (Not Enterable)	ADJUN	ADJUN
Step: (Not Enterable)	0	0
Job Status: (Not Enterable)	Active	A

9. Update Factors, Pays, and Hours – see table below for instructions

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Update Factors, Pays, and Hours,

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		02/01/2015
Factor: (Not Enterable)		4
Pays: (Not Enterable)		4
Hours per Pay: (Not Enterable)		84

No Action Needed

10. Terminate Employee Job

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Terminate Employee Job, 004030-00 Adjunct Instructors

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)		05/31/2015
Job Status: *(Not Enterable)		T
Job Change Reason: *(Not Enterable)		JBEND

No Action Needed

11. Labor Distribution – Update if Needed

a. The current position's labor distribution information is displayed. The "Labor Distribution in effect as of entered effective date" is the most current effective date for this position number.

a. In the "NEW" section – add new rows or make changes to the existing rows. If no changes are needed, then take no action.

b. EFFECTIVE DATE: The effective date in most cases is either 09/01/20__ or 02/01/20__.

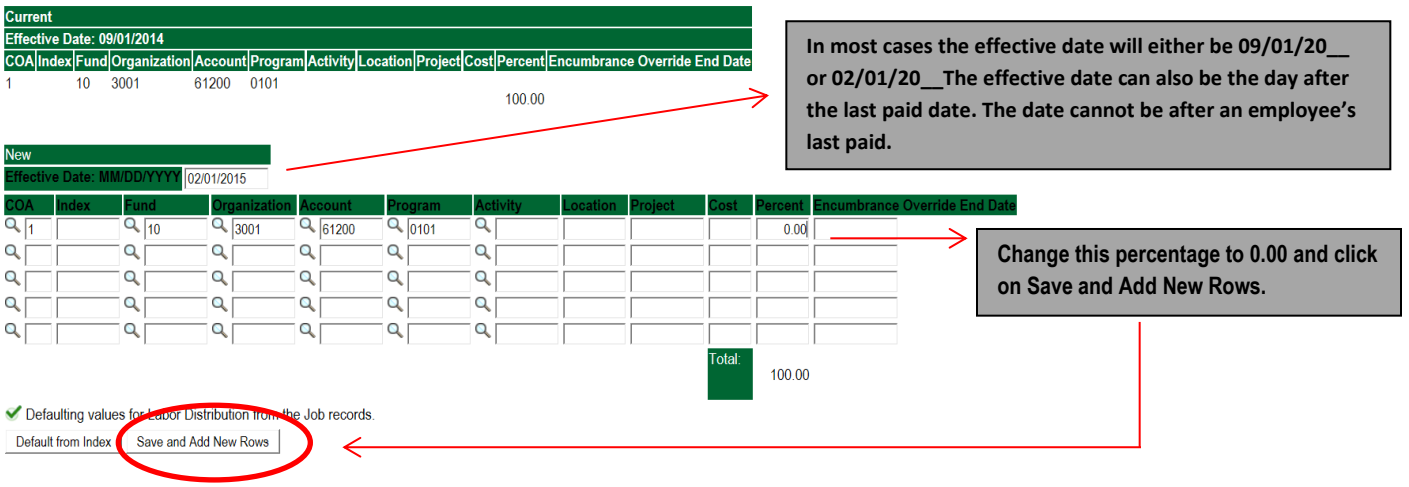
c. Apply the appropriate changes to the field if necessary.

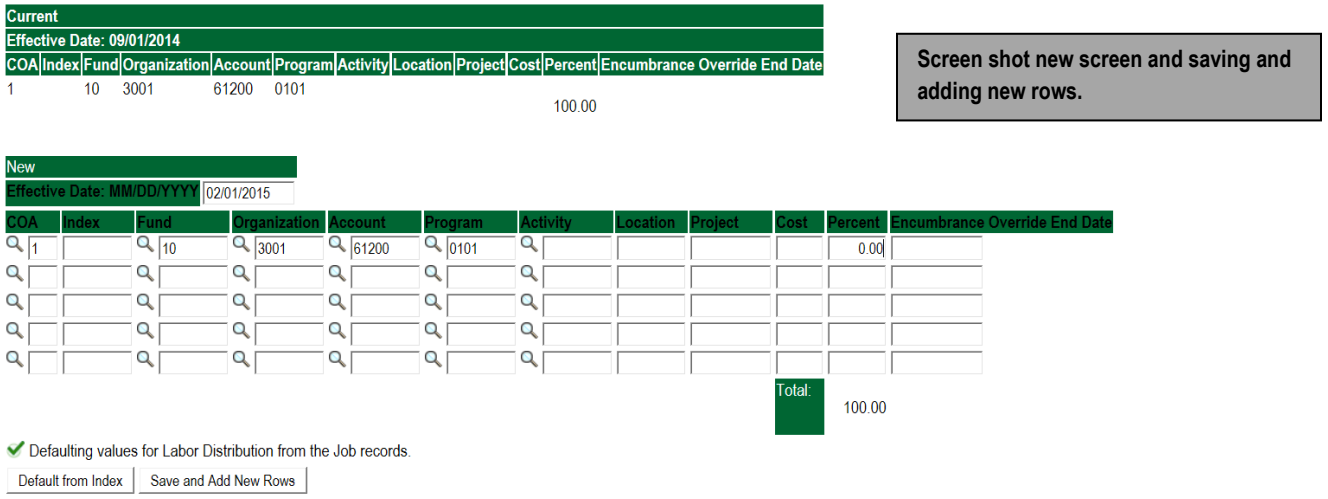
d. Changes to the accounting information will be LIMITED. The correct accounting information should default in the field according to the position number being used.

e. The fund, organization, account, and program codes will NOT need to be change unless payment is being charged by grant or other funds.

Steps to change Labor Distributions

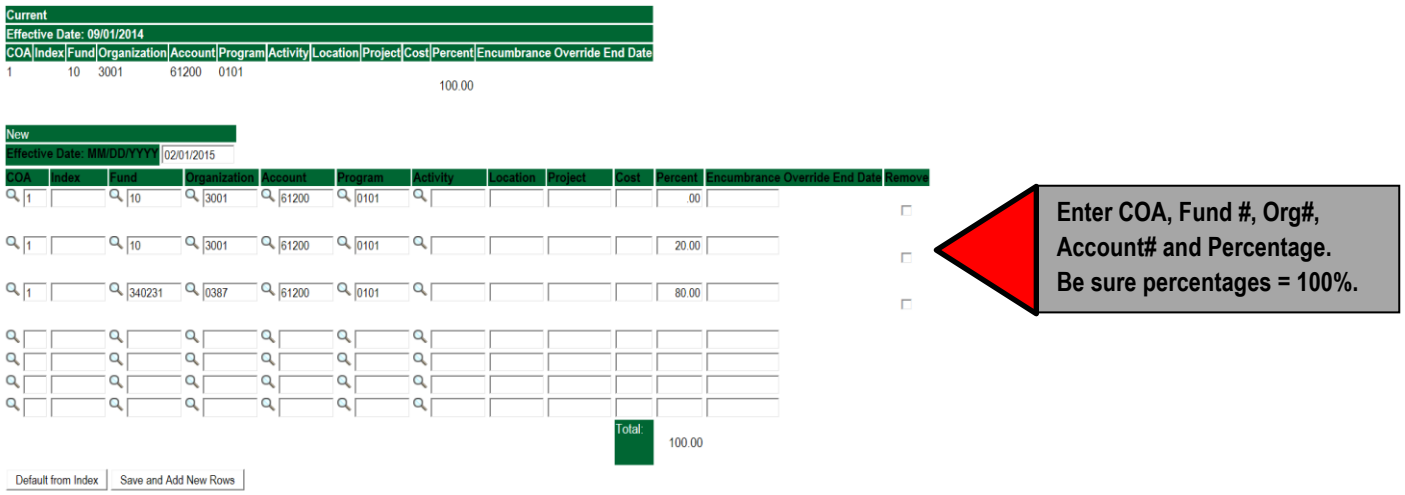
1. Change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.



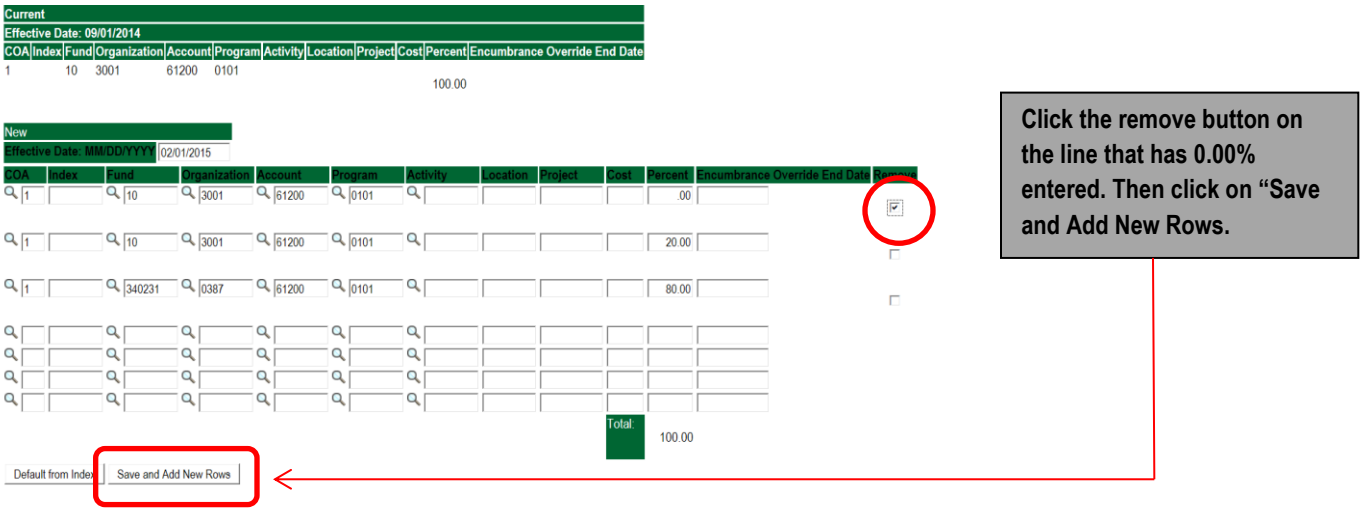


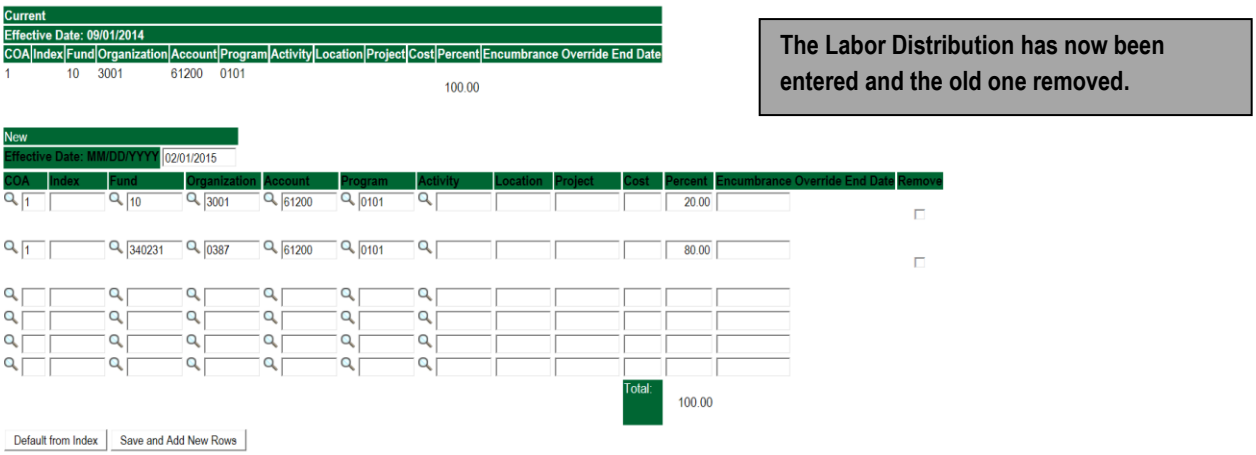
2. Enter the new accounting information. The following must be entered for each line.
   a. COA = enter 1.
   b. Fund No. =
   c. Organization No. =
   d. Account No. = 61200
   e. Percentage = totals must equal 100%. See sample below

Click to “Save and Add New Rows”



3. Click on the box under the “Remove” Column to remove the old accounting information. The percentage should be set 0.00%.
4. Click on Save and Add New Rows. The old accounting information should be removed.





12. Routing Queue

- In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- For Adjunct Rehires, **all EPAFs must have a Chair and Dean level approval.** Other approval levels will default.
- For Grants, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office**. Other approval levels will default.
- For Continuing Education courses, add **Dean, Graduate and Continuing Education and Continuing Education (Marilyn Read).**

Routing Queue

Approval Level	User Name		Required Action	Remove
10 - (CHAIR) Chair			Approve	
15 - (DEAN) Dean			Approve	
39 - (ACAFF1) Academic Affairs (Hayley)	HMURRELL	Hayley Henderson Pinion	Approve	☐
40 - (ACDAFF) Academic Affairs	CBALLARD	Cheryl M Ballard	Approve	
45 - (PROVOS) Provost of Academic Affairs	CMCADAMS	Charles Alan McAdams	Approve	
50 - (HRFYI) HR FYI	SMPHILLIPS	Samantha Myers Phillips	FYI	
65 - (BUDGET) Budget Office	TAWALKER	Tonia Ann Walker	Approve	
70 - (PAYROL) Payroll FYI (Monthly)	CLITTON	Charlotte M Litton	FYI	
75 - (HRDIR) Human Resource Director	LGIGER	Lisa Weeks Giger	Approve	
99 - (SUPER) Superuser	CLITTON	Charlotte M Litton	Apply	
Not Selected			Not Selected	
Not Selected			Not Selected	
Not Selected			Not Selected	
Not Selected			Not Selected	

Save and Add New Rows

13. Click on the **"Save and Add New Rows".**

14. Comments

- In the "Comments" section, enter comments for the approvers with an explanation for the action.
- In the "Comment" section, also enter the following for overload information:
  - CRN #:
  - Credit Hour:
  - Course Number:
  - Course Title:
  - Section:
  - Enrollment:
  - Reason for Overload:

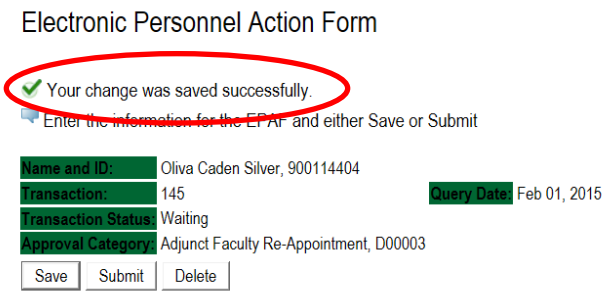
Comment

CRN #: 32330 | Credit Hour: 3 | Course #: DMI 100 | Course Title: Intro to Multimedia | Section: 21 | Enrollment: 5 | Reason for Pay: Insufficient faculty

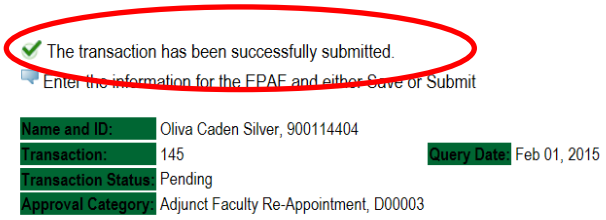
Enter additional information here.

Enter: CRN #: | Credit Hour: | Course #: | Course Title | Section: | Enrollment: | Reason for Pay: include whether the course is offered through Continuing Education.

15. **Save EPAF**
    - Hit the "Save" Button at the bottom of the form.
    - Return to the top of the form.
    - The message should display – **"Your change was saved successfully."**
    - Check your date entry



16. **Submit EPAF**
    - Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
    - The EPAF automatically routes to the approvers in the order of their approval levels.



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Errors and Warning Messages

Type	Message Type	Description
Add Employee Job	WARNING	*WARNING* This employee is terminated on the Employee Form.
Add Employee Job	WARNING	*WARNING* The Employee's Term Date and Reason should be removed from PEAEMPL.
Add Employee Job	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
Update Factors, Pays and Hours	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.

* - indicates a required field.

Delete

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

How to Process:

Summer School Overload Pay
Summer School Overload Pay (Continuing Education)
Summer School Overload Pay – Course Taught Over Both Sessions
Summer School Overload Pay (Continuing Education) – Course Taught Over Both Sessions

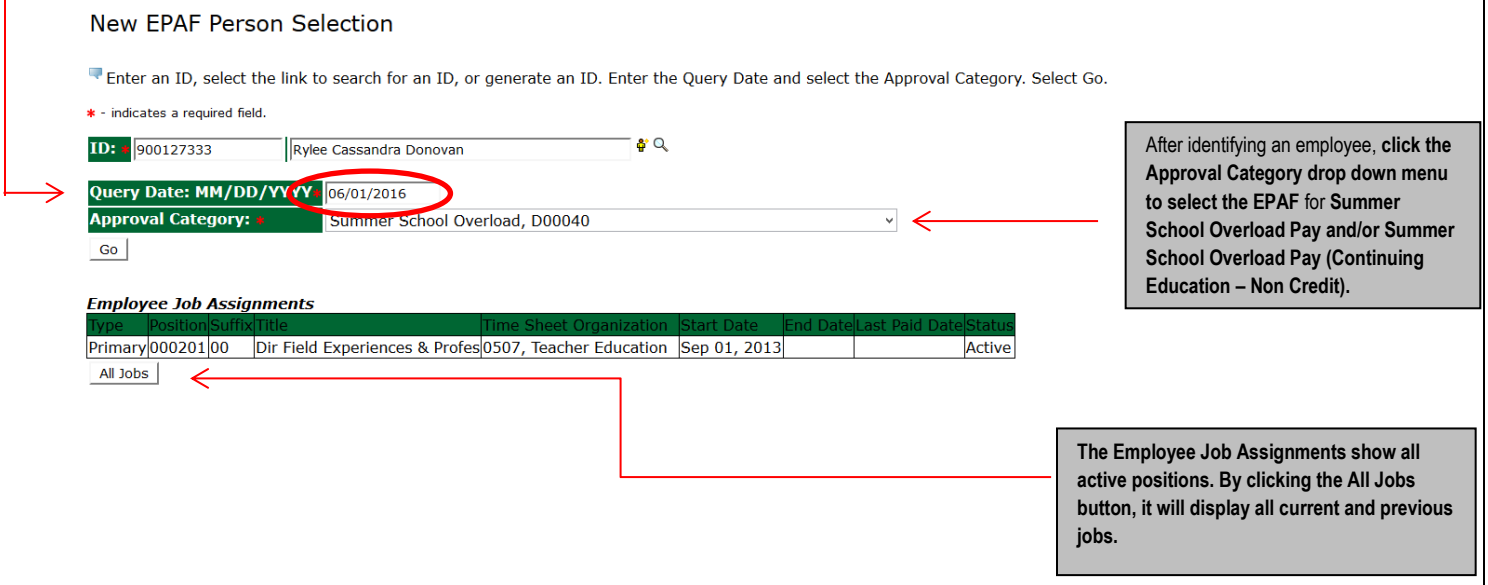
Log into Employee Self Service and choose **ELECTRONIC PERSONNEL ACTION FORMS** and then **NEW EPAF.**

This EPAF should be used to process an overload for current faculty/staff employees and adjuncts, which already have an active job for the semester. The steps below should be followed:

- Enter the employee's 900# or click on the magnifying glass to search for an employee's 900#.
- The query date will default to today's date. Change the query date to:
  a. Summer School Session I: **06/01/2021 or 06/01/20__**
  b. Summer School Session II: **07/01/2021 or 07/01/20__**
- Select from the drop down approval category box
  - **Summer School Overload Pay**
  - **Summer School Overload Pay (Continuing Education)**
  - **Summer School Overload Pay – Course Offered Over Both Sessions**
  - **Summer School Overload Pay – Continuing Education – Course Offered Over Both Sessions**

!!! IMPORTANT !!!

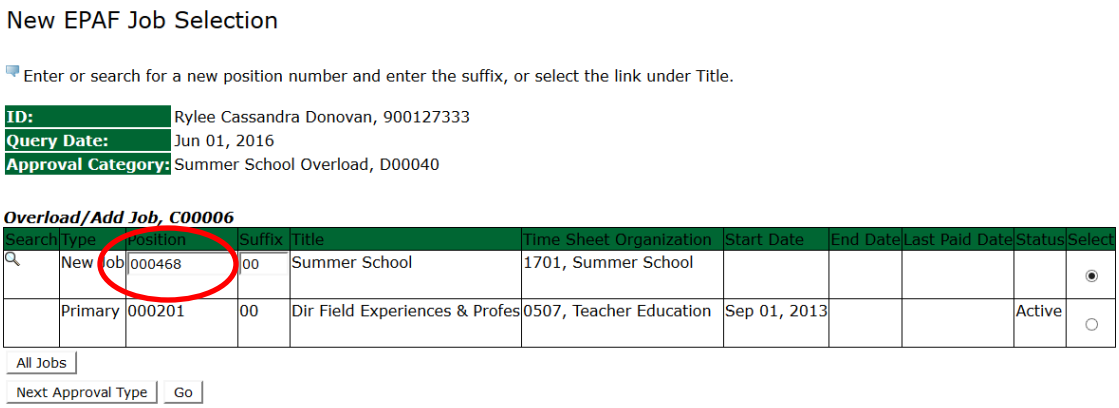
MAKE SURE THE QUERY DATE IS SET TO THE DATE YOU WANT THE TRANSACTION TO TAKE PLACE. IF IT IS NOT SET TO THE CORRECT DATE, IT WILL CAUSE AN ERROR AND YOU WILL HAVE TO RESTART THE EPAF.



- Click on "Go" to begin the Summer School Overload Pay and/or Summer School Overload Pay (Continuing Education – Non Credit) EPAF.

- Enter the correct position numbers in the format indicated below and click on "GO". If a position number has already been assigned to the employee, select the radial dial at the end of the line and click on "GO". **It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.**

Position #:	Suffix #:	Description
000468	00	Overloads paid for *credit hour* courses.
004025	00	Overloads paid by other funds (not grants). The fund #s usually start with 108.
004030	00	Overloads paid by grant funding. The fund #s usually start with 3.
000478	00	Overloads paid by Continuing Education. The section numbers will start with a "c". Example: Section c21



New EPAF Job Selection

Enter or search for a new position number and enter the suffix, or select the link under Title.

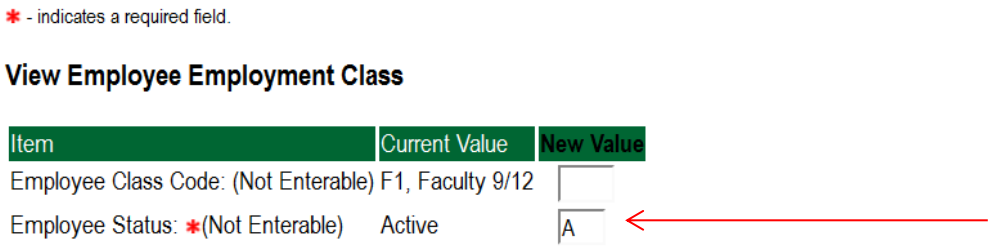
ID: Rylee Cassandra Donovan, 900127333
Query Date: Jun 01, 2016
Approval Category: Summer School Overload, D00040

Overload/Add Job, C00006

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job	000468	00	Summer School	1701, Summer School					
	Primary	000201	00	Dir Field Experiences & Profes	0507, Teacher Education	Sep 01, 2013			Active	

All Jobs | Next Approval Type | Go

- View Employee Class:
  a. This section allows the originator to view the current employee's employment information.
  b. Employment Status must equal (A) – Active.
  c. If employment status is listed something else other than Active, do not use this EPAF.
  d. *These fields are not able to be changed.*

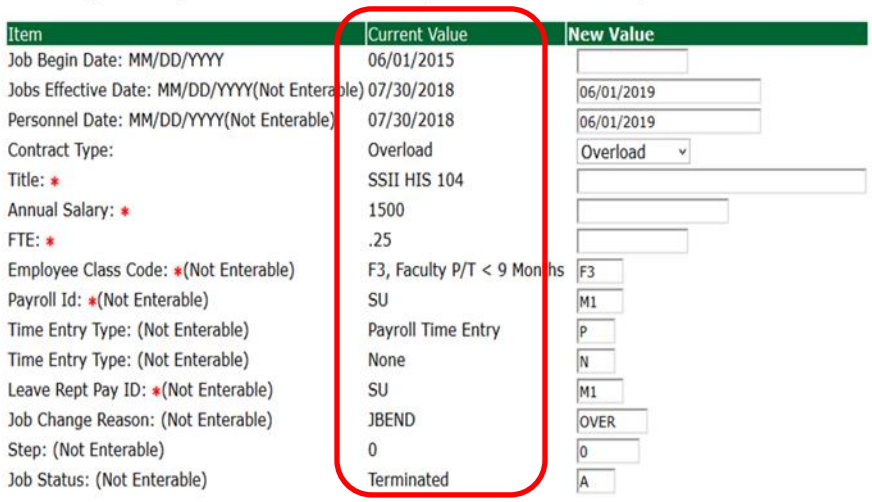
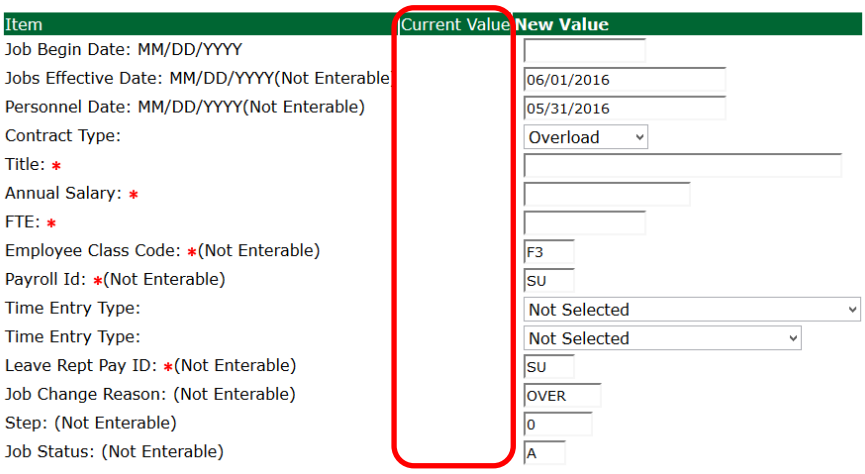


* - indicates a required field.

View Employee Employment Class

Item	Current Value	New Value
Employee Class Code: (Not Enterable)	F1, Faculty 9/12	
Employee Status: *(Not Enterable)	Active	A

- **Enter Overload Pay Information**

<table>
<tr><th>Field</th><th>Statement/Action</th><th>Action/Example</th></tr>
<tr><td>Job Begin Date:</td><td>If the “Current Value” column is populated, then →
Overload/Add Job, 000468-00 SSII HIS 104, Last Paid Date: Jul 30, 2018
 
<table>
<tr><th>Item</th><th>Current Value</th><th>New Value</th></tr>
<tr><td>Job Begin Date: MM/DD/YYYY</td><td>06/01/2015</td><td></td></tr>
<tr><td>Jobs Effective Date: MM/DD/YYYY(Not Enterable)</td><td>07/30/2018</td><td>06/01/2019</td></tr>
<tr><td>Personnel Date: MM/DD/YYYY(Not Enterable)</td><td>07/30/2018</td><td>06/01/2019</td></tr>
<tr><td>Contract Type:</td><td>Overload</td><td>Overload</td></tr>
<tr><td>Title: *</td><td>SSII HIS 104</td><td></td></tr>
<tr><td>Annual Salary: *</td><td>1500</td><td></td></tr>
<tr><td>FTE: *</td><td>.25</td><td></td></tr>
<tr><td>Employee Class Code: *(Not Enterable)</td><td>F3, Faculty P/T < 9 Months</td><td>F3</td></tr>
<tr><td>Payroll Id: *(Not Enterable)</td><td>SU</td><td>M1</td></tr>
<tr><td>Time Entry Type: (Not Enterable)</td><td>Payroll Time Entry</td><td>P</td></tr>
<tr><td>Time Entry Type: (Not Enterable)</td><td>None</td><td>N</td></tr>
<tr><td>Leave Rept Pay ID: *(Not Enterable)</td><td>SU</td><td>M1</td></tr>
<tr><td>Job Change Reason: (Not Enterable)</td><td>JBEND</td><td>OVER</td></tr>
<tr><td>Step: (Not Enterable)</td><td>0</td><td>0</td></tr>
<tr><td>Job Status: (Not Enterable)</td><td>Terminated</td><td>A</td></tr>
</table></td><td>Leave “Job Begin Date” field blank</td></tr>
<tr><td></td><td>If the “Current Value” field is not populated, then, →
Overload/Add Job, 000468-00 Summer School
 
<table>
<tr><th>Item</th><th>Current Value</th><th>New Value</th></tr>
<tr><td>Job Begin Date: MM/DD/YYYY</td><td></td><td></td></tr>
<tr><td>Jobs Effective Date: MM/DD/YYYY(Not Enterable</td><td></td><td>06/01/2016</td></tr>
<tr><td>Personnel Date: MM/DD/YYYY(Not Enterable)</td><td></td><td>05/31/2016</td></tr>
<tr><td>Contract Type:</td><td></td><td>Overload</td></tr>
<tr><td>Title: *</td><td></td><td></td></tr>
<tr><td>Annual Salary: *</td><td></td><td></td></tr>
<tr><td>FTE: *</td><td></td><td></td></tr>
<tr><td>Employee Class Code: *(Not Enterable)</td><td></td><td>F3</td></tr>
<tr><td>Payroll Id: *(Not Enterable)</td><td></td><td>SU</td></tr>
<tr><td>Time Entry Type:</td><td></td><td>Not Selected</td></tr>
<tr><td>Time Entry Type:</td><td></td><td>Not Selected</td></tr>
<tr><td>Leave Rept Pay ID: *(Not Enterable)</td><td></td><td>SU</td></tr>
<tr><td>Job Change Reason: (Not Enterable)</td><td></td><td>OVER</td></tr>
<tr><td>Step: (Not Enterable)</td><td></td><td>0</td></tr>
<tr><td>Job Status: (Not Enterable)</td><td></td><td>A</td></tr>
</table></td><td>Enter:
(enter corresponding dates)

06/01/20__– Summer School I

07/01/20__ - for Summer School II</td></tr>
<tr><td>Job Effective Date:</td><td>Field cannot be changed. Information is defaulted.</td><td></td></tr>
<tr><td>Job Personnel Date:</td><td>Field cannot be changed. Information is defaulted.</td><td></td></tr>
<tr><td>Title:</td><td>Enter the course information for the overload that is being paid.</td><td>Example:

Summer School ART 101
OR

SSI ART 101/ART 103</td></tr>
<tr><td>Annual Salary:</td><td>Total amount to be paid for course overloads</td><td>3000.00</td></tr>
<tr><td>FTE:</td><td>FTE for overload is calculated as follows:

.25 = 1 course overload .75 = 3 course overload
.50 = 2 course overload 1.00 = 4 course overload</td><td>Enter the number FTE for the number of course overloads:

Example: .25</td></tr>
<tr><td>Contract Type</td><td>Field cannot be changed. Information is defaulted.</td><td></td></tr>
</table>

Employee Class Code	Field cannot be changed. Information is defaulted.	
Payroll ID	Payroll ID will default to **SU**. Field can be change.	Payroll ID **SU** should remain defaulted.
Leave Rept Pay ID	The Leave Report Pay ID should match the Payroll ID above.	Match Leave Rept Pay ID to Payroll ID **SU**
Job Change Reason	Field cannot be changed. Information is defaulted.	
Step	Field cannot be changed. Information is defaulted.	
Job Status	Field cannot be changed. Information is defaulted.	

Overload/Add Job, 000468-00 Summer School

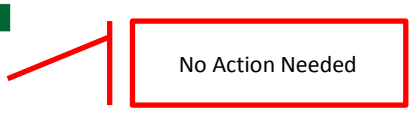
Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		06/01/2016
Personnel Date: MM/DD/YYYY(Not Enterable)		05/31/2016
Contract Type:		Overload
Title: *		Summer School ART 101
Annual Salary: *		3000.00
FTE: *		.25
Employee Class Code: *(Not Enterable)		F3
Payroll Id: *(Not Enterable)		SU
Leave Rept Pay ID: *(Not Enterable)		SU
Job Change Reason: (Not Enterable)		OVER
Step: (Not Enterable)		0
Job Status: (Not Enterable)		A

- **Update Factor, Pays, and Hours**

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Update Factors, Pays and Hours, 000468-00 Summer School

Item	Current Value	New Value
Factor: *(Not Enterable)		1
Pays: *(Not Enterable)		1
Hours per Pay: *(Not Enterable)		84
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)		06/01/2016



- **Terminate Employee Job**

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

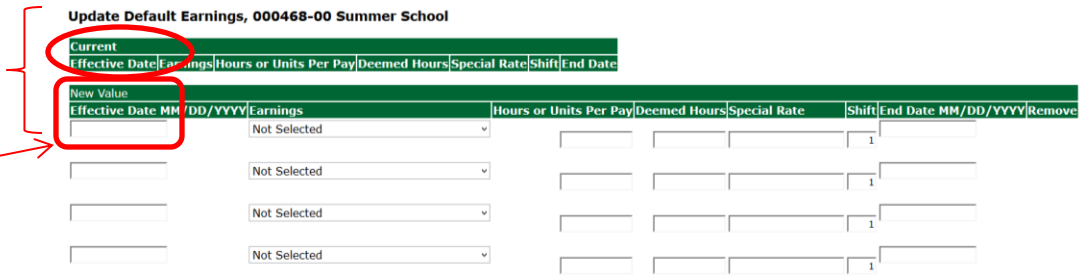
Terminate Job Only, 000468-00 Summer School

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)		06/29/2016
Job Status: *(Not Enterable)		T
Job Change Reason: *(Not Enterable)		JBEND

No Action Needed

- **Update Default Earnings**
  a. In the "CURRENT" section – If there is not a date entered under the effective date, then a new effective date will need to be entered under the "NEW VALUE" section.

If a current date is not listed under the "CURRENT" effective date, then enter 06/01/20__ for Summer School I or 07/01/20__ for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.



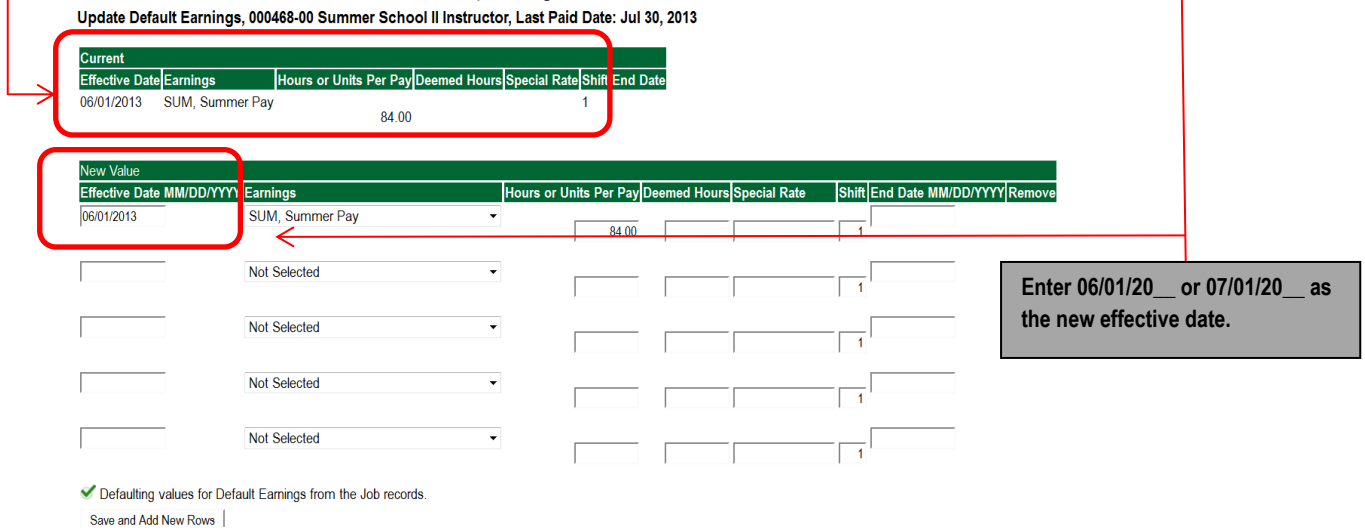
  b. Enter **06/01/20__** for Summer School I or **07/01/20__** for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.
  c. Select SUM, Summer Pay as the Earnings Code using the drop down box.
  d. Enter **84.00** as the Hours or Units Per Pay.

Update Default Earnings, 000468-00 Summer School

Current						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date

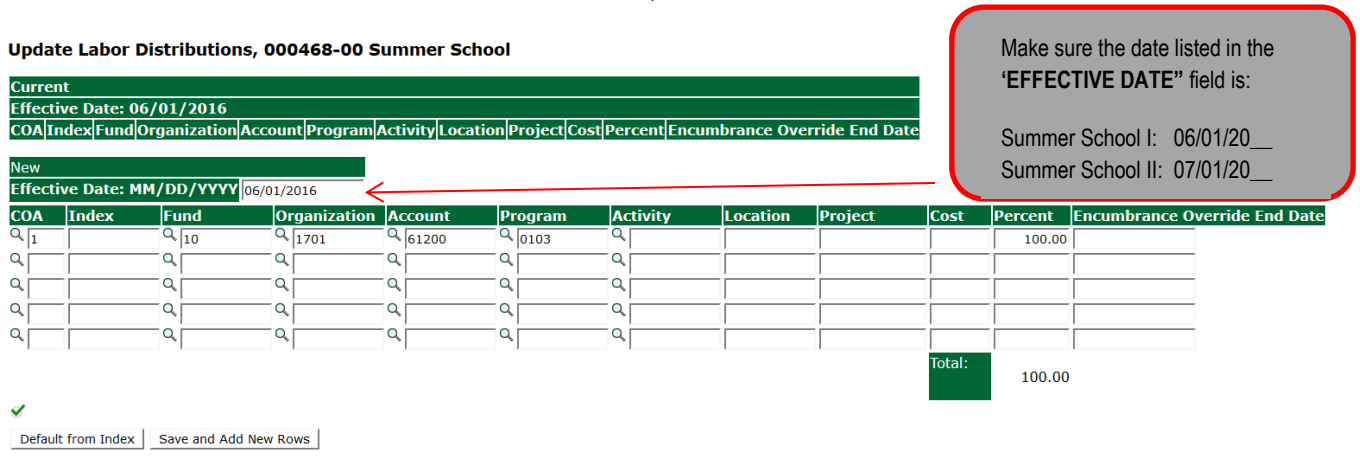
New Value							
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY	Remove
06/01/2016	SUM, Summer Pay	84.00			1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		

If the fields are populated under the **"CURRENT EFFECTIVE DATE"** as shown below, then under the **"NEW VALUE EFFECTIVE DATE"**, enter 06/01/20__ or 07/01/20__ depending on the summer session.



- **Labor Distribution – Update if Needed**
  a. In the "CURRENT" section – the current labor codes and the effective date of the last change will default into the form.
  b. In the "NEW" section – add new rows or make changes to the existing rows.
  c. Changes to the accounting information will be LIMITED. The correct accounting information should default in the field according to the position number being used.
  d. The fund, organization, account, and program codes will NOT need to be change unless payment is being charged by grant or other funds.
  e. EFFECTIVE DATE: The effective date should equal either: 06/01/20__ or 07/01/20__ depending on the summer school session and the appropriate year.
  f. Apply the appropriate changes to the field if necessary.

MAKE SURE THE DATE IN THE "EFFECTIVE DATE" FIELD IS 06/01/20__ OR 07/01/20__ DEPENDING ON THE SUMMER SCHOOL SESSION AND THE YEAR. IF NOT, THE EPAF WILL CONTAIN AN ERROR.



Steps to change Labor Distributions

1. Change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.

The effective date will default to the query date or today's date. This needs to be changed to the following:

Summer School I: 06/01/20__
Summer School II: 07/01/20__

Update Labor Distributions, 000468-00 Summer School

Current
Effective Date: 06/01/2016

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

New
Effective Date: MM/DD/YYYY 06/01/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	1701	61200	0103					100.00	

Total: 100.00

Change this percentage to 0.00 and click on Save and Add New Rows.

Default from Index | Save and Add New Rows

Update Labor Distributions, 000468-00 Summer School

Current
Effective Date: 06/01/2016

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

New
Effective Date: MM/DD/YYYY 06/01/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	1701	61200	0103					0.00	

Total: 100.00

Default from Index | Save and Add New Rows

5. Enter the new accounting information. The following must be entered for each line.
   a. COA = enter 1.
   b. Fund No.
   c. Organization No.
   d. Account No. = 61200
   e. Percentage = totals must equal 100%. See sample below

Click to "Save and Add New Rows"

Update Labor Distributions, 000468-00 Summer School

Current
Effective Date: 06/01/2016

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

New
Effective Date: MM/DD/YYYY 06/01/2016

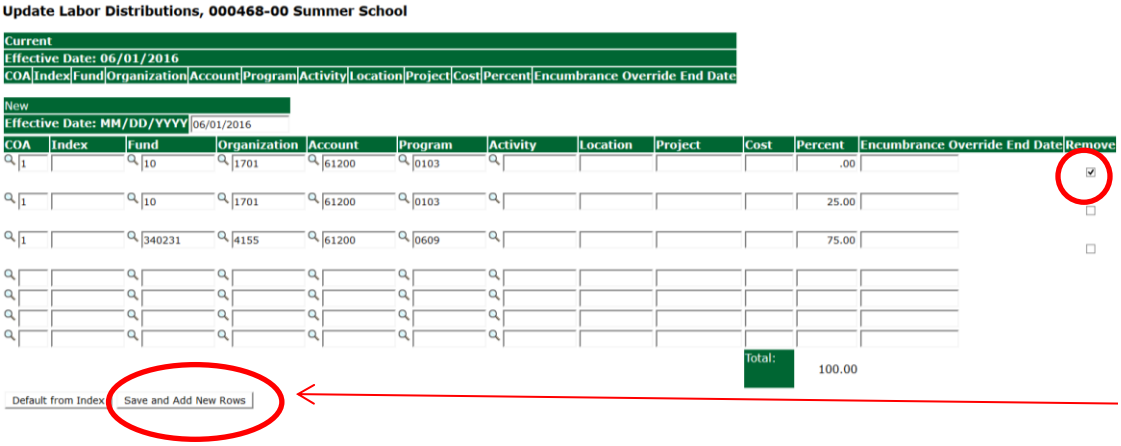
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	1701	61200	0103					0.00	
1		10	1701	61200						25.00	
1		340231	4155	61200						75.00	

Total: 100.00

Enter COA, Fund #, Org#, and Account# and percentage.

Default from Index | Save and Add New Rows

6. Click on the box under the "Remove" Column to remove the old accounting information. The percentage should be set 0.00%.
7. Click on Save and Add New Rows. The old accounting information should be removed.



Click the remove button on the line that has 0.00% entered. Then click on "Save and Add New Rows.

8. **Routing Queue**
   a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
   b. For Overloads, **all EPAFs must have a Chair and Dean level approval.**
   c. For Grants, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office**. Other approval levels will default.
   d. For Continuing Education courses, add **Dean, Graduate and Continuing Education and Continuing Education (Marilyn Read).**

Routing Queue

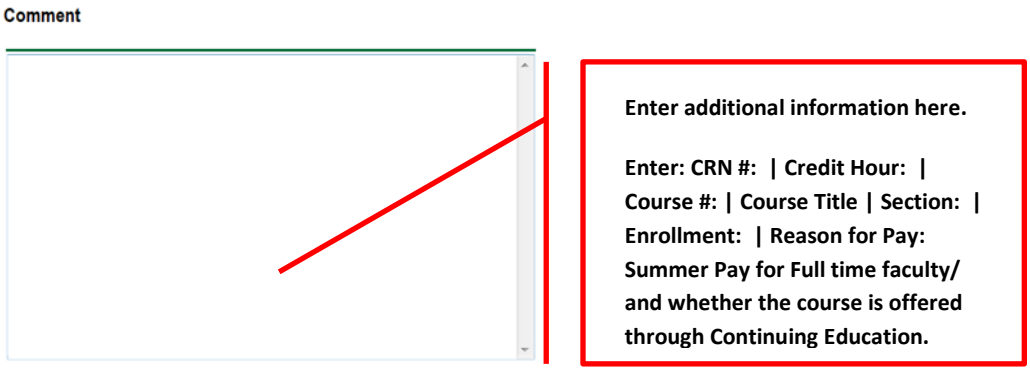
Approval Level	User Name		Required Action	Remove
10 - (CHAIR) Chair			Approve	
15 - (DEAN) Dean			Approve	
39 - (ACAFF1) Academic Affairs (Hayley)	HMURRELL	Hayley Henderson Pinion	Approve	☐
40 - (ACDAFF) Academic Affairs	CBALLARD	Cheryl M Ballard	Approve	
45 - (PROVOS) Provost of Academic Affairs	CMCADAMS	Charles Alan McAdams	Approve	
50 - (HRFYI) HR FYI	SMPHILLIPS	Samantha Myers Phillips	FYI	
65 - (BUDGET) Budget Office	TAWALKER	Tonia Ann Walker	Approve	
70 - (PAYROL) Payroll FYI (Monthly)	CLITTON	Charlotte M Litton	FYI	
75 - (HRDIR) Human Resource Director	LGIGER	Lisa Weeks Giger	Approve	
99 - (SUPER) Superuser	CLITTON	Charlotte M Litton	Apply	
Not Selected			Not Selected	
Not Selected			Not Selected	
Not Selected			Not Selected	
Not Selected			Not Selected	

Save and Add New Rows

9. Click on the **"Save and Add New Rows".**

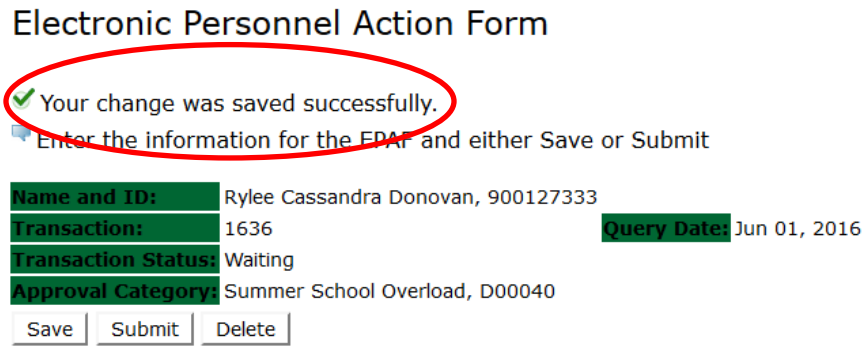
10. Comments

a. In the "Comments" section, enter comments for the approvers with an explanation for the action.
b. In the "Comment" section, also enter the following for overload information separated as shown below:
   i. CRN #:
   ii. Credit Hour:
   iii. Course Number:
   iv. Course Title:
   v. Section:
   vi. Enrollment:
   vii. Reason for Overload: Summer Pay for Full Time Faculty



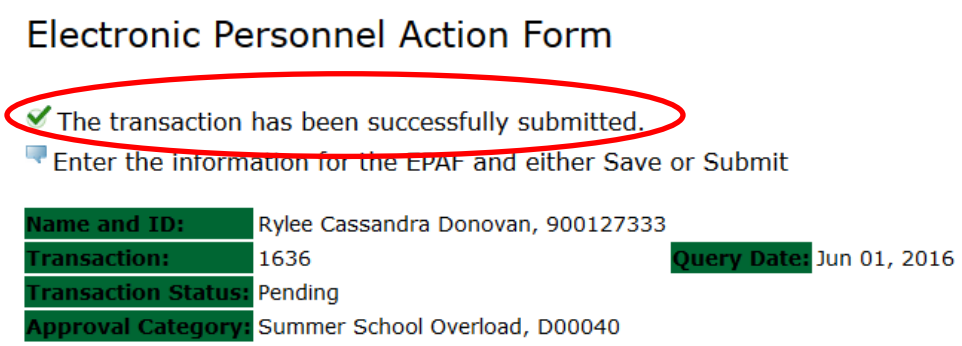
11. Save EPAF

a. Hit the "Save" Button at the bottom of the form.
b. Return to the top of the form.
c. The message should display – **"Your change was saved successfully."**
d. Check your date entry



12. Submit EPAF

a. Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
b. The EPAF automatically routes to the approvers in the order of their approval levels.



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Errors and Warning Messages

Type	Message Type	Description
Add Employee Job	WARNING	*WARNING* This employee is terminated on the Employee Form.
Add Employee Job	WARNING	*WARNING* The Employee's Term Date and Reason should be removed from PEAEMPL.
Add Employee Job	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
Update Factors, Pays and Hours	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.

* - indicates a required field.

Delete

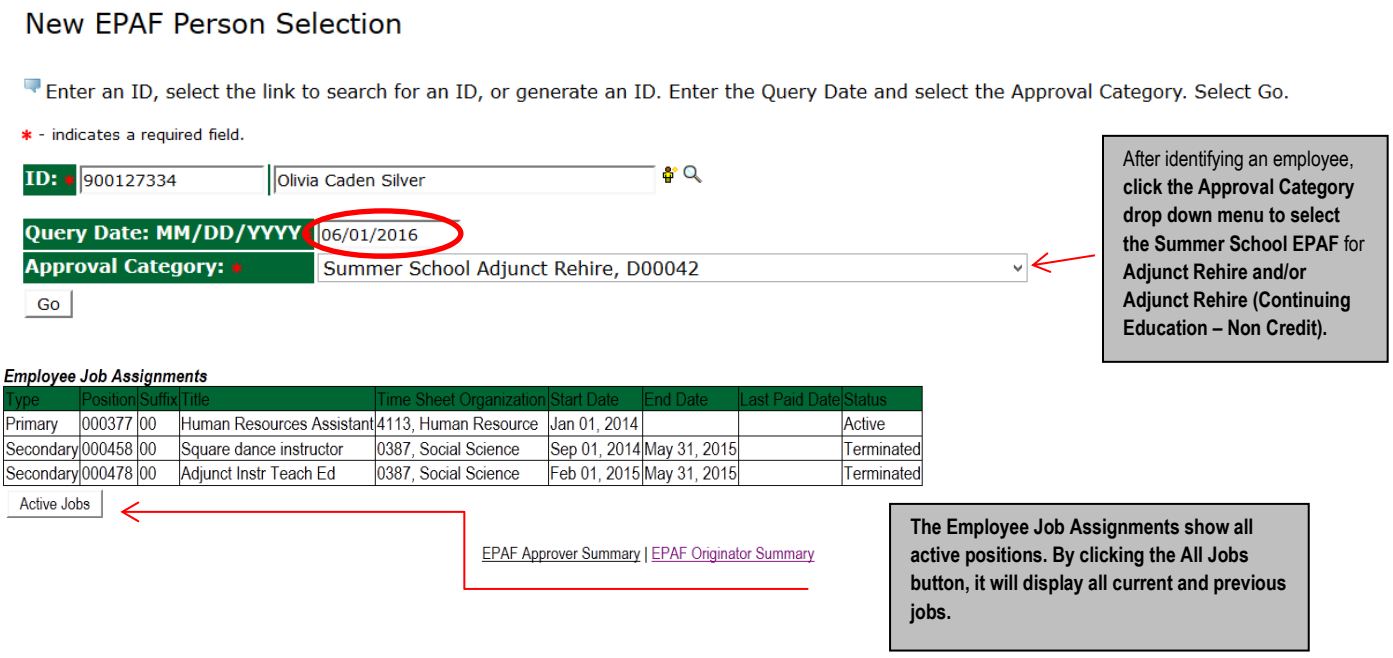
If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

How to Process:
Summer School Adjunct Re-Appointment
Summer School Adjunct Re-Appointment (Continuing Education)
Summer School Adjunct Re-Appointment – Course Taught Over Both Sessions
Summer School Adjunct Re-Appointment – (Continuing Education) - Course Taught Over Both Sessions

Log into Employee Self Service and choose **ELECTRONIC PERSONNEL ACTION FORMS** and then **NEW EPAF.**

This EPAF should be used to rehire an adjunct. The steps below should be followed:

1. Enter the employee's 900# or click on the magnifying glass to search for an employee's 900#.
2. The query date will default to today's date. Change the query date to the dates below with the appropriate year.
   a. Summer School I: **06/01/20__**
   b. Summer School II: **07/01/20__**
3. Select from the drop down approval category box:
   - **Summer School Adjunct Re-Appointment**
   - **Summer School Adjunct Re-Appointment (Continuing Education)**
   - **Summer School Adjunct Re-Appointment (Course Taught Over Both Sessions)**
   - **Summer School Adjunct Re-Appointment – Continuing Education (Course Taught Over Both Sessions**



4. Click on "Go" to begin the Summer School EPAFs for Adjunct Rehire and/or Adjunct Rehire (Continuing Education – Non Credit).
5. Click on the button **"All Jobs".**
6. Select the position in which to reactivate by clicking on the radial dial at the end of the row. The position to reactivate will usually be position 000468 for credit courses and 000478 for Continuing Education – Non Credit courses.

7. If the employee does not have a job with the correct position number, then enter the position number in the format indicated below and click on "GO". **It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.**

Position #:	Suffix #:	Description
000468	00	Overloads paid for *credit hour* courses.
004025	00	Overloads paid by other funds (not grants). The fund #s usually start with 108.
004030	00	Overloads paid by grant funding. The fund #s usually start with 3.
000478	00	Overloads paid by Continuing Education. The section numbers will start with a "c". Example: Section c21

Overload/Add Job, C00006

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job	000468	00	Summer School	1701, Summer School					
	Primary	000003	00	Assistant Professor of Art	0507, Teacher Education	Aug 15, 2013			Active	

All Jobs

Next Approval Type | Go

Enter Adjunct Employment Record – See table below for instructions.

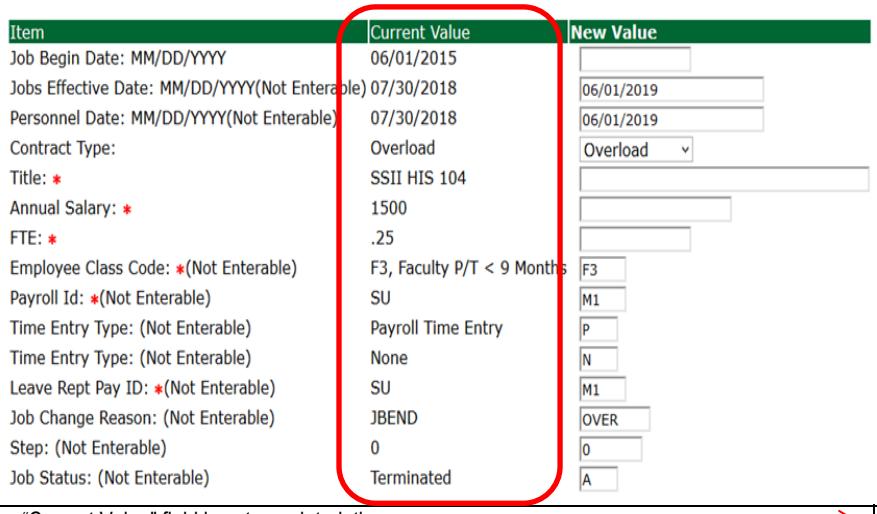
Field	Statement/Action	Action/Example
Home Organization	Change if needed. A change is usually not needed	0387
Distribution Org	Change if needed. If Home organization is change, then distribution org must match home org.	
Current Hire Date	Field cannot be changed. Information is defaulted.	No action needed
Employee Status	Field cannot be changed. Information is defaulted.	No action needed
Employee Class Code	Enter the following if needed: (Usually a change is not needed) F3=adjunct employee RT=reemployment of PERS retiree	F3 or RT
Home COAS	Field cannot be changed. Information is defaulted.	No action needed
Term Reason Code:	Field cannot be changed. Information is defaulted.	No action needed
Terminate Date:	Field cannot be changed. Information is defaulted.	No action needed
Last Work Date:	Field cannot be changed. Information is defaulted.	No action needed

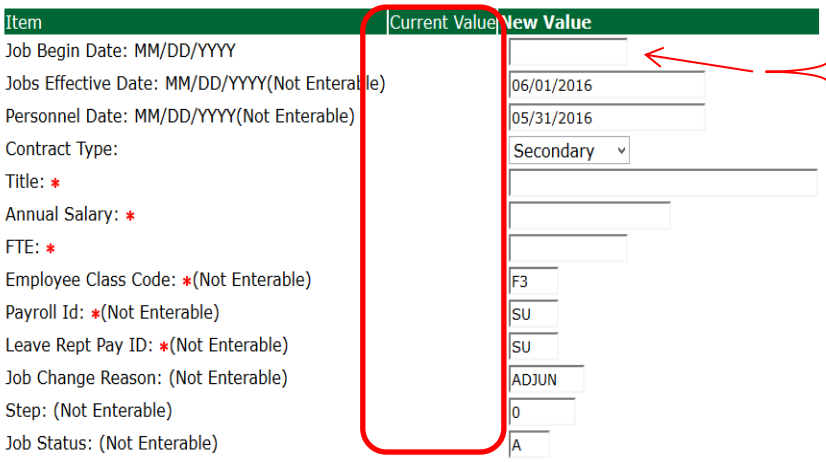
An * is a required field.

Item	Current Value	New Value
Home Organization:	0377, Music	
Distribution Orgn:	0377, Music	
Current Hire Date: MM/DD/YYYY(Not Enterable)	01/01/2016	
Employee Status: *(Not Enterable)	Active	A
Employee Class Code:	F3, Faculty P/T < 9 Months	
Home COAS: *(Not Enterable)	1	1
Term Reason Code: (Not Enterable)		JE
Termination Date: MM/DD/YYYY(Not Enterable)		06/29/2016
Last Work Date: MM/DD/YYYY(Not Enterable)		06/29/2016

- **Enter Overload Pay Information**

<table>
<tr><th>Field</th><th>Statement/Action</th><th>Action/Example</th></tr>
<tr><td>Job Begin Date:</td><td>If the “Current Value” column is populated, then →

Overload/Add Job, 000468-00 SSII HIS 104, Last Paid Date: Jul 30, 2018
 
</td><td>Leave “Job Begin Date” field blank</td></tr>
<tr><td></td><td>If the “Current Value” field is not populated, then, →

Add Employee Job, 000468-00 Summer School
 
</td><td>Enter:
(enter corresponding dates)

06/01/20__ – Summer School I

07/01/20__ - for Summer School II</td></tr>
<tr><td>Job Effective Date:</td><td>Field cannot be changed. Information is defaulted.</td><td></td></tr>
<tr><td>Job Personnel Date:</td><td>Field cannot be changed. Information is defaulted.</td><td></td></tr>
<tr><td>Title:</td><td>Enter the course information for the overload that is being paid.</td><td>Example:

Adjunct Instr in Art</td></tr>
<tr><td>Annual Salary:</td><td>Total amount to be paid for course overloads</td><td>3000.00</td></tr>
<tr><td>FTE:</td><td>FTE for overload is calculated as follows:

.25 = 1 course overload .75 = 3 course overload
.50 = 2 course overload 1.00 = 4 course overload</td><td>Enter the number FTE for the number of course overloads:

Example: .25</td></tr>
<tr><td>Contract Type</td><td>Field cannot be changed. Information is defaulted.</td><td></td></tr>
<tr><td>Employee Class Code</td><td>Field cannot be changed. Information is defaulted.</td><td></td></tr>
</table>

Payroll ID	Payroll ID will default to **SU**. Field can be change.	Payroll ID **SU** should remain defaulted.
Leave Rept Pay ID	The Leave Report Pay ID should match the Payroll ID above.	Match Leave Rept Pay ID to Payroll ID **SU**
Job Change Reason	Field cannot be changed. Information is defaulted.	
Step	Field cannot be changed. Information is defaulted.	
Job Status	Field cannot be changed. Information is defaulted.	

- **Update Factor, Pays, and Hours**

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Update Factors, Pays and Hours, 000468-00 Summer School

Item	Current Value	New Value
Factor: *(Not Enterable)		1
Pays: *(Not Enterable)		1
Hours per Pay: *(Not Enterable)		84
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)		06/01/2016

No Action Needed

- **Terminate Employee Job**

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

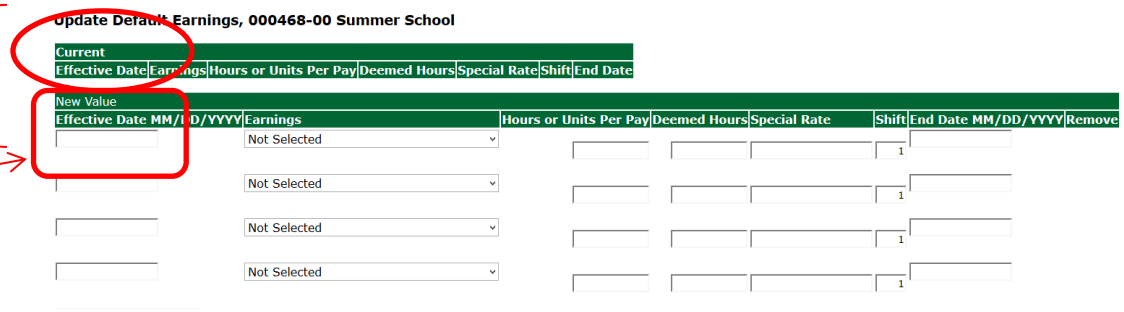
Terminate Job Only, 000468-00 Summer School

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)		06/29/2016
Job Status: *(Not Enterable)		T
Job Change Reason: *(Not Enterable)		JBEND

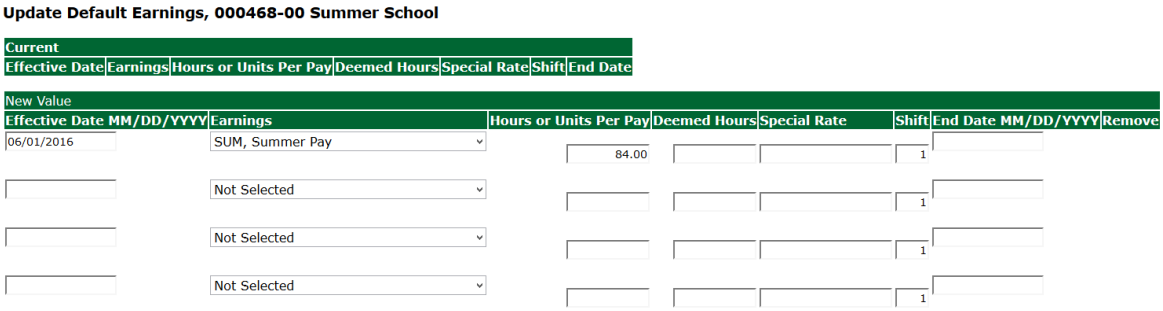
No Action Needed

- **Update Default Earnings**
  a. In the "CURRENT" section – If there is not a date entered under the effective date, then a new effective date will need to be entered under the "NEW VALUE" section.

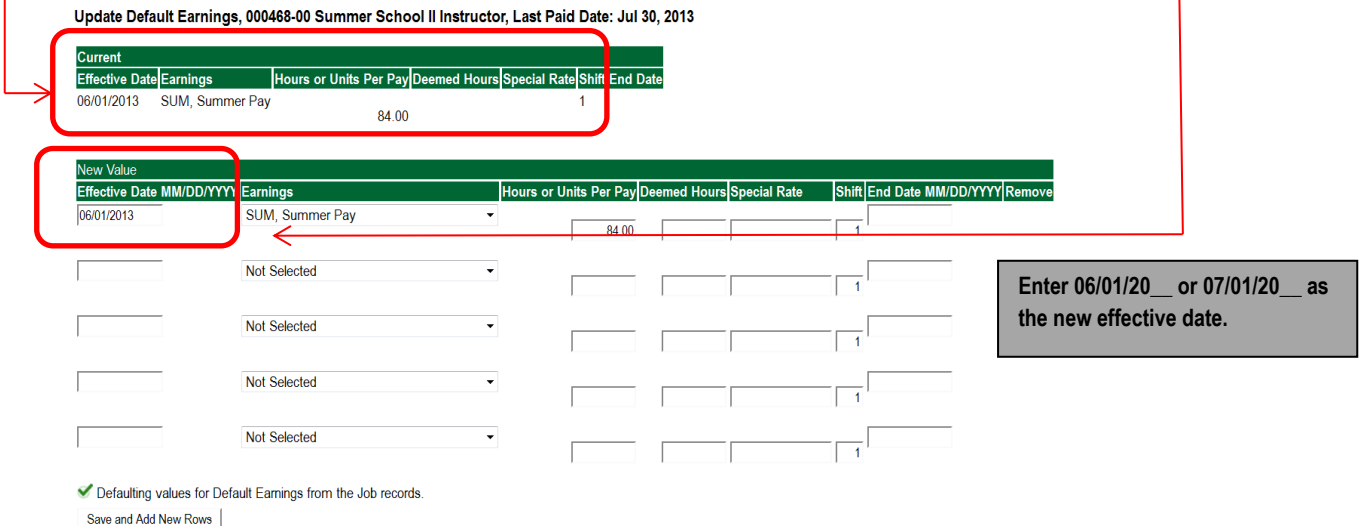
If a current date is not listed under the "CURRENT" effective date, then enter 06/01/20__ for Summer School I or 07/01/20__ for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.



  b. Enter **06/01/20**__ for Summer School I or **07/01/20**__ for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.
  c. Select SUM, Summer Pay as the Earnings Code using the drop down box.
  d. Enter **84.00** as the Hours or Units Per Pay.



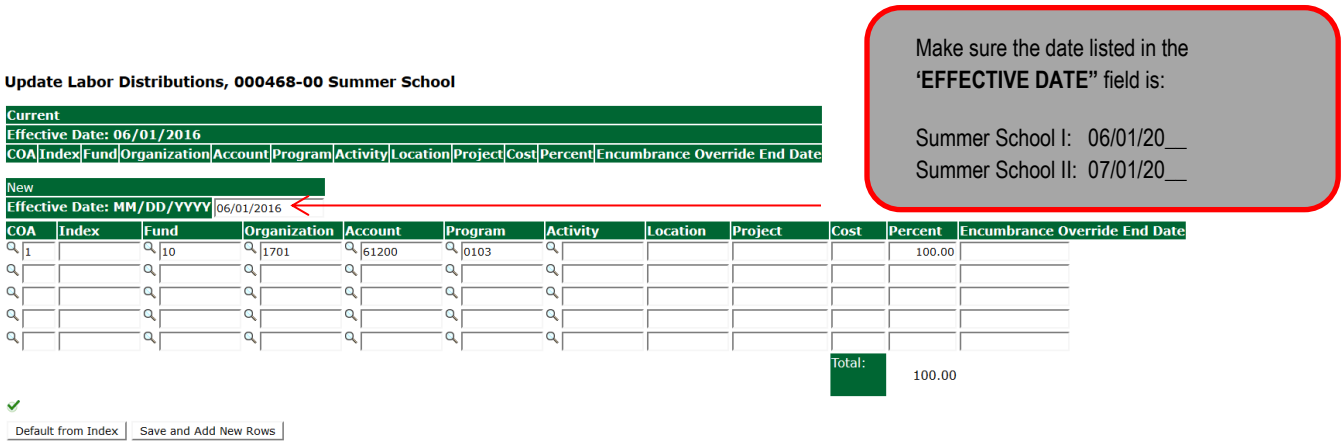
If the fields are populated under the **"CURRENT EFFECTIVE DATE"** as shown below, then under the **"NEW VALUE EFFECTIVE DATE"**, enter 06/01/20__ or 07/01/20__ depending on the summer session.



Enter 06/01/20__ or 07/01/20__ as the new effective date.

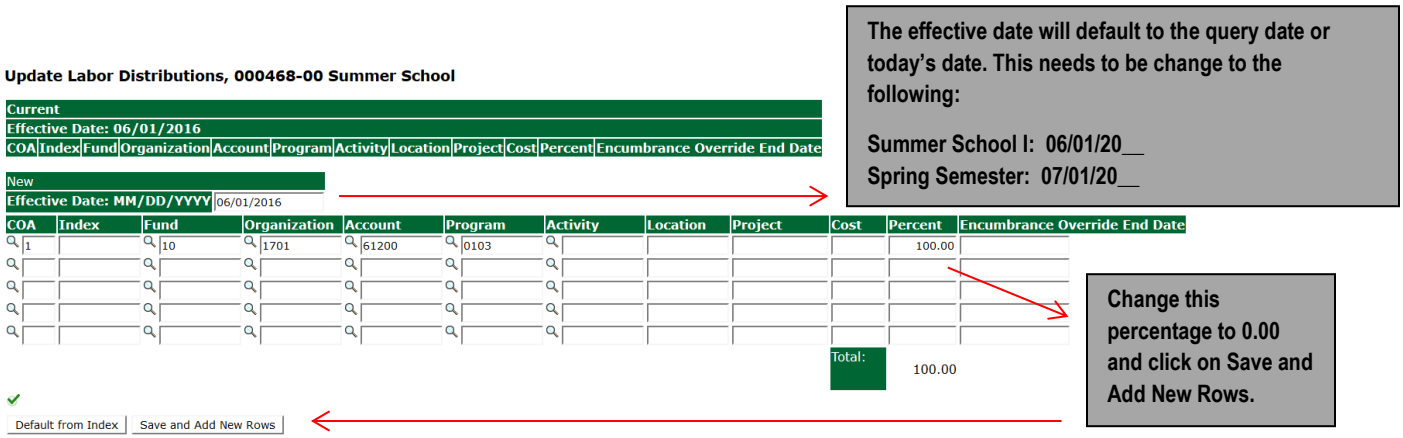
- **Labor Distribution – Update if Needed**
    a. In the "CURRENT" section – the current labor codes and the effective date of the last change will default into the form.
    b. In the "NEW" section – add new rows or make changes to the existing rows.
    c. Changes to the accounting information will be LIMITED. The correct accounting information should default in the field according to the position number being used.
    d. The fund, organization, account, and program codes will NOT need to be change unless payment is being charged by grant or other funds.
    e. EFFECTIVE DATE: The effective date should equal either: 06/01/20__ or 07/01/20__ depending on the summer school session.
    f. Apply the appropriate changes to the field if necessary.

MAKE SURE THE DATE IN THE "EFFECTIVE DATE" FIELD IS 06/01/2018 OR 07/01/2018 DEPENDING ON THE SUMMER SCHOOL SESSION. IF NOT, THE EPAF WILL CONTAIN AN ERROR.



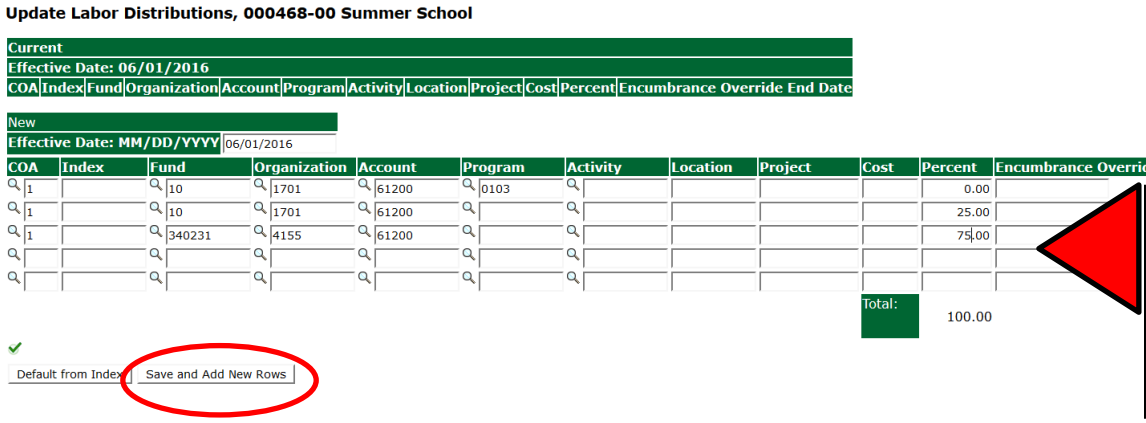
Steps to change Labor Distributions

2. Change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.

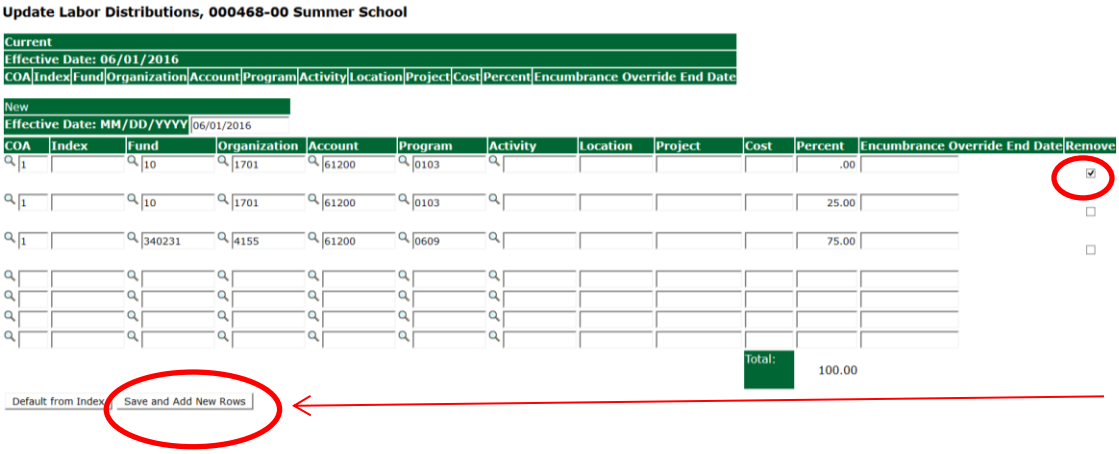


13. Enter the new accounting information. The following must be entered for each line.
    a. COA = enter 1.
    b. Fund No.
    c. Organization No.
    d. Account No. = 61200
    e. Percentage = totals must equal 100%. See sample below

Click to “Save and Add New Rows”



14. Click on the box under the “Remove” Column to remove the old accounting information. The percentage should be set 0.00%.
15. Click on Save and Add New Rows. The old accounting information should be removed.



16. Routing Queue

a. In the “Routing Queue” section, enter a User Name for each level of approver. Additional approver levels may be added with a ‘Required Action’ of ‘Approve’ or ‘FYI’ only.
b. For Overloads, **all EPAFs must have a Chair and Dean level approval.**
c. For Grants, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office**. Other approval levels will default.
d. For Continuing Education courses, add **Dean, Graduate and Continuing Education and Continuing Education (Marilyn Read).**

Routing Queue

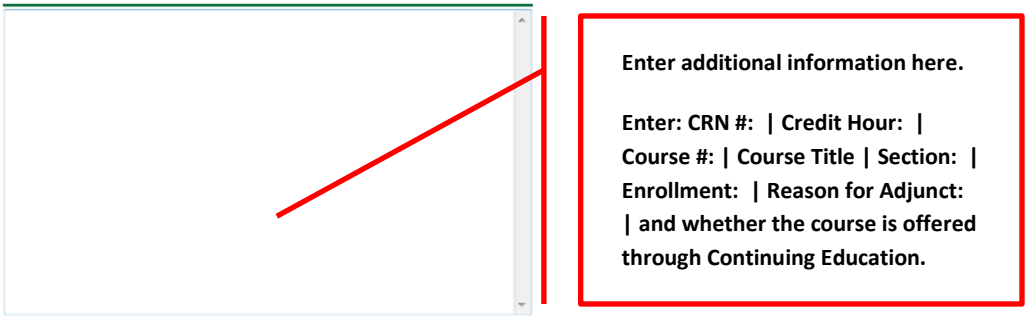
Approval Level	User Name		Required Action	Remove
10 - (CHAIR) Chair			Approve	
15 - (DEAN) Dean			Approve	
39 - (ACAFF1) Academic Affairs (Hayley)	HMURRELL	Hayley Henderson Pinion	Approve	☐
40 - (ACDAFF) Academic Affairs	CBALLARD	Cheryl M Ballard	Approve	
45 - (PROVOS) Provost of Academic Affairs	CMCADAMS	Charles Alan McAdams	Approve	
50 - (HRFYI) HR FYI	SMPHILLIPS	Samantha Myers Phillips	FYI	
65 - (BUDGET) Budget Office	TAWALKER	Tonia Ann Walker	Approve	
70 - (PAYROL) Payroll FYI (Monthly)	CLITTON	Charlotte M Litton	FYI	
75 - (HRDIR) Human Resource Director	LGIGER	Lisa Weeks Giger	Approve	
99 - (SUPER) Superuser	CLITTON	Charlotte M Litton	Apply	
Not Selected			Not Selected	
Not Selected			Not Selected	
Not Selected			Not Selected	
Not Selected			Not Selected	

Save and Add New Rows

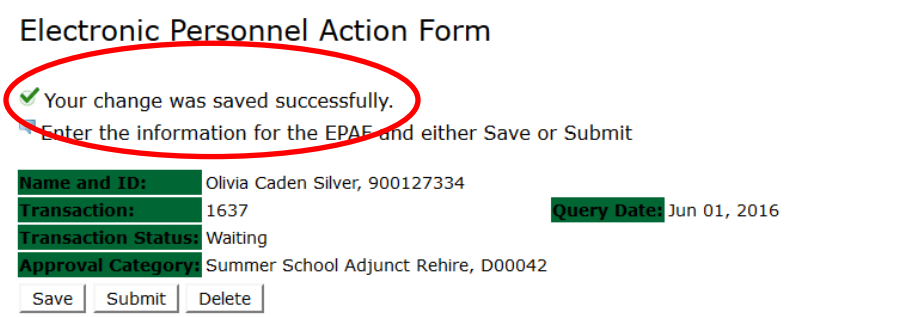
17. Click on the **"Save and Add New Rows".**

18. **Comments**
    a. In the "Comments" section, enter comments for the approvers with an explanation for the action.
    b. In the "Comment" section, also enter the following for overload information separated as shown below:
        i. CRN #:
        ii. Credit Hour:
        iii. Course Number:
        iv. Course Title:
        v. Section:
        vi. Enrollment:
        vii. Reason for Adjunct:

Comment



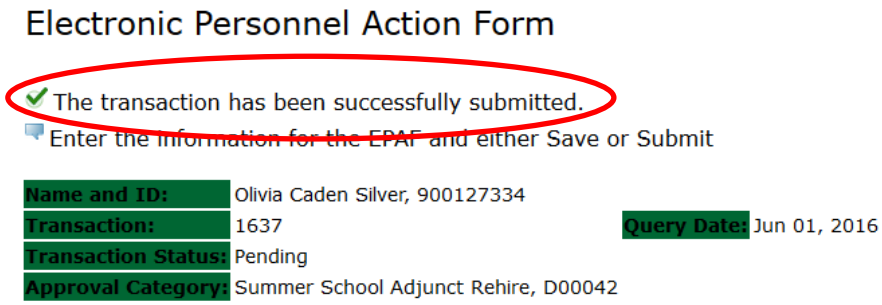
19. **Save EPAF**
    a. Hit the "Save" Button at the bottom of the form.
    b. Return to the top of the form.
    c. The message should display – **"Your change was saved successfully."**
    d. Check your date entry



20. Submit EPAF

a. Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.

b. The EPAF automatically routes to the approvers in the order of their approval levels.



How to Process:

One Time Payment – Extra Services (Non Academic Affairs)
One Time Payment – Extra Services (Academic Affairs)

Log into Employee Self Service and choose **ELECTRONIC PERSONNEL ACTION FORMS** and then **NEW EPAF.**

This EPAF should be used to process payment for additional duties/services performed. The steps below should be followed:

1. Enter the employee's 900# or click on the magnifying glass to search for an employee's 900#.
2. The query date will default to today's date. Change the query date to the first day of the month in which the pay is to be issued. MM/01/20__

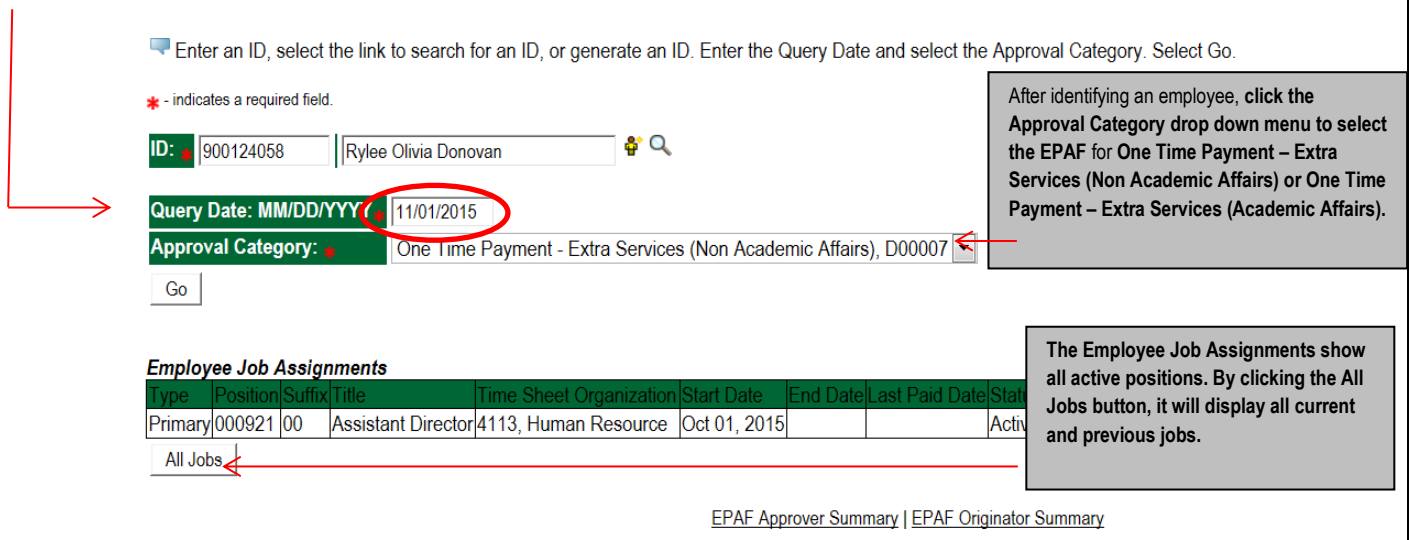
   EXAMPLE: 01/01/2021 OR 02/01/2021 OR 10/01/2020
3. Select **One Time Payment – Extra Services (Non Academic Affairs) or One Time Payment – Extra Services (Academic Affairs)** from the drop down approval category box.

   Non Academic Affairs = *any departments that do not report to the Provost*, but report to other Vice Presidents/Directors. This EPAF is used for payments by departments that do not report to the Provost.

   Academic Affairs = *departments that report to the Provost*. This EPAF is used for payments made by departments/divisions that report directly to the provost.

!!! IMPORTANT !!!

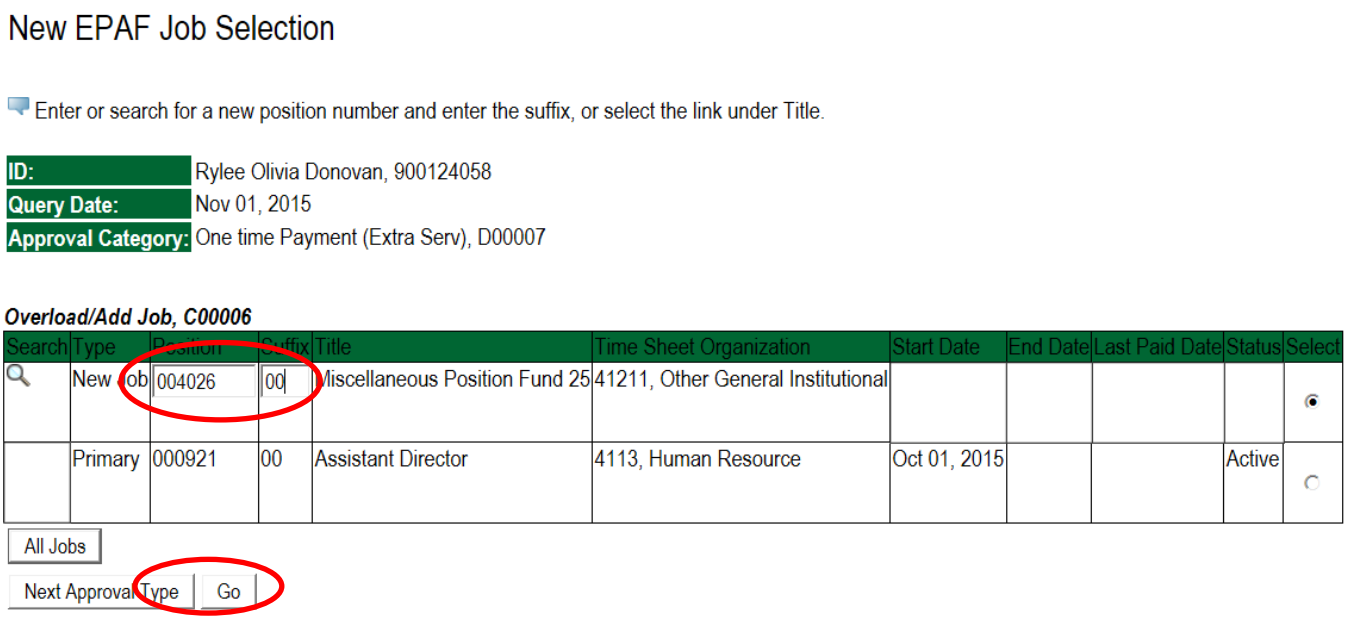
MAKE SURE THE QUERY DATE IS SET TO THE FRIST DAY OF THE MONTH YOU WANT THE TRANSACTION TO TAKE PLACE. IF IT IS NOT SET TO THE CORRECT DATE, IT WILL CAUSE AN ERROR AND YOU WILL HAVE TO RESTART THE EPAF.



4. Click on "Go" to begin the One Time Payment – Extra Services (Non Academic Affairs) or One Time Payment – Extra Services (Academic Affairs) EPAF.

5. Enter the correct position numbers in the format indicated below and click on "GO". If a position number has already been assigned to the employee, select the radial dial at the end of the line and click on "GO". **It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.**

Position #:	Suffix #:	Description
000458	00	One-Time Payments – Extra Services paid by Org. 3001.
004010	00	One Time Payments – Extra Services paid to **FACULTY** by fund 10 monies. The fund #s start with 10.
004011	00	One Time Payments – Extra Services paid to **STAFF** by fund 10 monies. The fund #s start with 10.
004025	00	One Time Payments – Extra Services paid to **FACULTY** by other funds (not grants). The fund #s usually start with 108. (Example: 108221)
004026	00	One Time Payments – Extra Services paid to **STAFF** by other funds (not grants). The fund #s usually start with 108. (Example: 108221)
004030	00	One Time Payments – Extra Services paid to **FACULTY** by grant funding. The fund #s usually start with "3" (Example: 340231)
004031	00	One Time Payments – Extra Services paid to **STAFF** by grant funding. The fund #s usually start with "3" (Example: 340231)
000478	00	One Time Payments – Extra Services paid by Continuing Education – Org. 3005
000997	00	One Time Payments – Extra Services paid by Continuing Education - Org. 3017; generally used only by Continuing Education.
001202	00	First Year Seminar



6. View Employee Class:
   - This section allows the originator to view the current employee's employment information.
   - Employment Status must equal (A) – Active.
   - If employment status is listed something else other than Active, do not use this EPAF.
   - Listed below are the definitions of the Employee Class Code
   - *These fields are not able to be changed.*

Employee Class Description	Employee Class Definition	Payroll ID
F1, Faculty 9/12	Faculty employee employed for 9 months and paid over 12 months	M1 payroll
F2, Faculty 9/9	Faculty employee employed for 9 months and paid over 9 months	M2 payroll
F4, Faculty 12/12	Faculty employee employed for 12 months and paid over 12 months	M1 payroll
F3, Faculty PT < 9 months	Adjunct faculty	M2 payroll
S1, Full Time Staff	Staff employee employed for 12 months and paid over 12 months	M1 payroll

S2, Part-Time Staff < 9 Months	Staff employee employed for less than 9 months and payment may vary	M2 payroll
S3, Part-Time 9-10 Month Staff	Staff employee appointment over 9-10 months	M1 or M2 payroll
S4, Part-Time 11-12 Month Staff	Staff employee paid over 12 months	M1 payroll
RT, PERS Reemployment of Retiree	Employee retired from the Public Employees' Retirement System	M1 or M2 payroll
ST, Student (WSR, RSE)	Student employee receiving extra compensation for extra duties performed	M2 payroll
GA, Graduate Assistant	Graduate Assistant receiving extra compensation for extra duties performed	M2 payroll
TE, Temporary Employee	Temporary Employee receiving extra compensation for extra duties performed	BW, M1 or M2 payroll

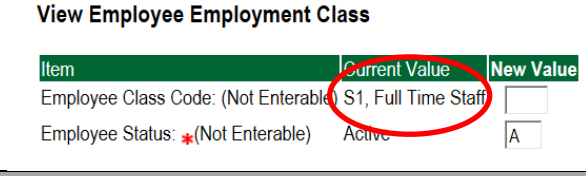
View Employee Employment Class

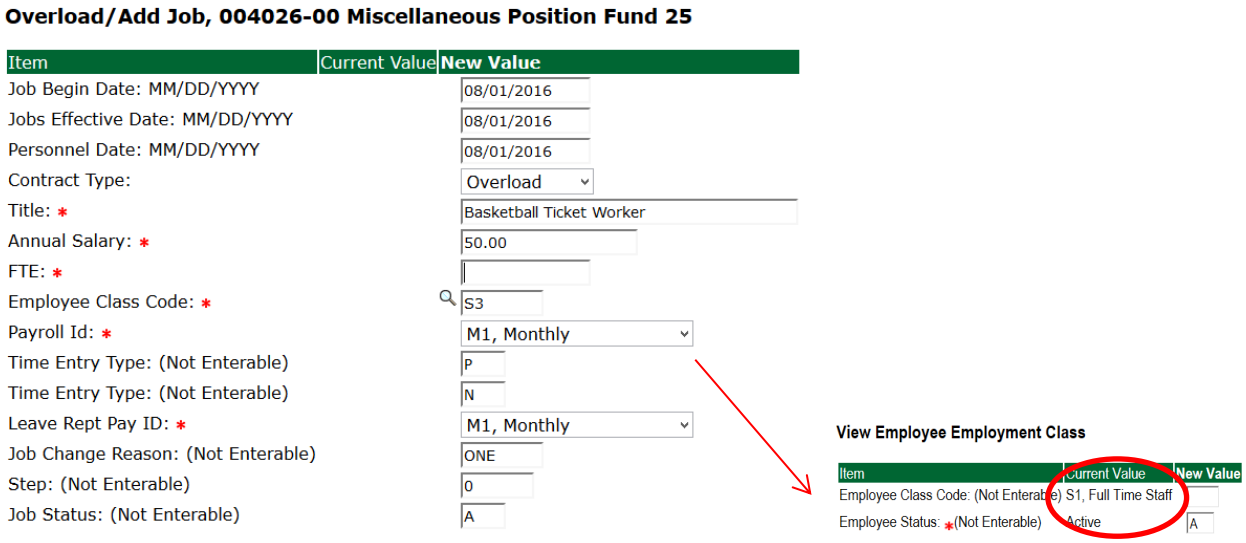
Item	Current Value	New Value
Employee Class Code: (Not Enterable)	S1, Full Time Staff	
Employee Status: *(Not Enterable)	Active	A

The Employee Class Code will most of the time tell you which payroll ID to use from the table above when processing an EPAF.

7. Enter Overload Pay Information

Field	Statement/Action	Action/Example
Job Begin Date:	If statement below says "Last Paid Date:"….then **Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 Overload ENG 10[illegible]. Last Paid Date: May 31, 2014** Item / Current Value / New Value Job Begin Date: MM/DD/YYYY	Leave field blank
	If there is no current values in the "Current Value" fields,……then **Overload/Add Job, 004026-00 Miscellaneous Position Fund 25** Item / Current Value / New Value Job Begin Date: MM/DD/YYYY	Enter: (enter corresponding year) MM/01/20__ Ex. 02/01/2020
Job Effective Date:	Enter the first day of the month for which the one-time payment – extra services are to be paid	MM/01/20__ Ex. 02/01/2020
Job Personnel Date:	Enter the first day of the month for which the one-time payment – extra services are to be paid. This date should match the "Job Effective Date"	MM/01/20__ Ex. 02/01/2020
Contract Type:	This field defaults to "Overload". Field may be changed to either Primary or Secondary.	
Title:	Enter the description of the one time payment – extra services performed **Overload/Add Job, 004026-00 Miscellaneous Position Fund 25** Item / Current Value / New Value Job Begin Date: MM/DD/YYYY 11/01/2015 Jobs Effective Date: MM/DD/YYYY 11/01/2015 Personnel Date: MM/DD/YYYY 11/01/2015 Contract Type: Overload Title: * Basketball Ticket Worker	Example: Basketball Ticket Worker First Year Seminar Instructor (used pos 001202 00)
Annual Salary:	Total amount to be paid for one time payments – extra services	100.00
FTE:	FTE for one time payments – extra services are generally 0.00	0.00
Employee Class Code	Field is defaulted to S3	
Payroll ID	Payroll ID will default to M2. Field can be change. If the employee class under the "View Employee Employment Class" is S1, S4, F1, or F4, or ….then If the employee class under the "View Employee Employment Class" is S2, F2, F3, ST, GA….then	Use the drop down box to change to M1. Payroll ID should ramain defaulted to M2.

	If the employee class under the "View Employee Employment Class" is RT, TE, S3…then the payroll ID will be determined based on previous job assignments. → 	Payroll ID will either be M1 or M2 based on previous job assignments.
Leave Rept Pay ID	The Leave Report Pay ID should match the Payroll ID above.	Match Leave Rept Pay ID to Payroll ID (either M1 or M2)
Job Change Reason	Field cannot be changed. Information is defaulted.	
Step	Field cannot be changed. Information is defaulted.	
Job Status	Field cannot be changed. Information is defaulted.	



8. Update Factor, Pays, and Hours

Field	Statement/Action	Action/Example
Factor:	The field will default to one. If the payment is to be paid over multiple months, then change the field to represent the number of months to be paid	If the payment will be paid over 2 months, then enter 2 in the "Factor" field.
Pays:	The field will default to one. The field must match the number of pays enter in the "Factor" Field	The Pays number will be 2 if this payment will be paid over 2 months.
Hours per Pay:	Field cannot be changed. Information is defaulted.	None
Job Effective Date:	Enter the first day of the month in which this one-time payment is to be paid	MM/01/20__ Ex. 02/01/2020

Update Factors, Pays and Hours, 004026-00 Miscellaneous Position Fund 25

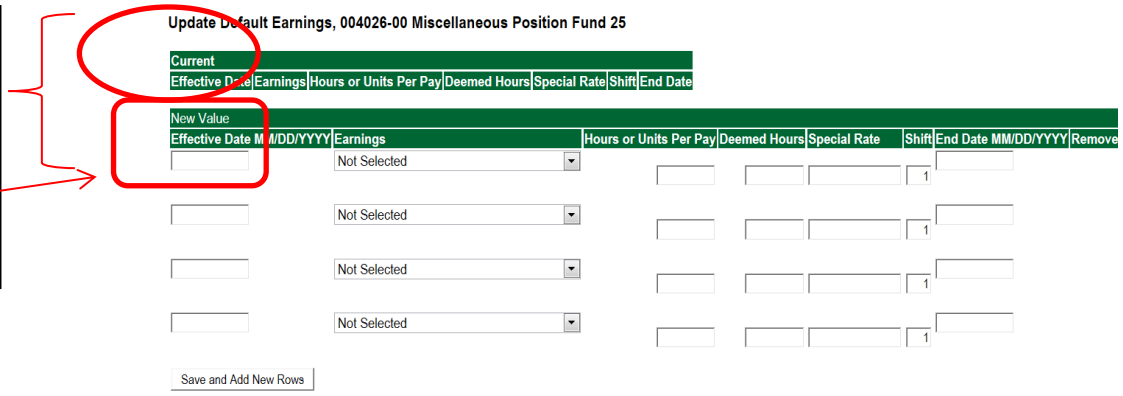
Item	Current Value	New Value
Factor: *		1
Pays: *		1
Hours per Pay: *(Not Enterable)		84.00
Jobs Effective Date: MM/DD/YYYY*		11/01/2015

Enter the same number in the factor and pays field in which the one time payment is to be paid. Enter the first day of the month in the Jobs Effective Date.

9. Update Default Earnings

a. In the "CURRENT" section – If there is not a date entered under the effective date, then a new effective date will need to be entered under the "NEW VALUE" section.

If a current date is not listed under the "CURRENT" effective date, then enter the first day of the month in which the one - time payment will be issued in the "NEW VALUE EFFECTIVE DATE" field. MM/01/20__, EX. 06/01/2020



b. Enter the first day of the month in which the one-time payment will be issued in the "NEW VALUE EFFECTIVE DATE" field. MM/01/20__ **EXAMPLE: 02/01/2020**

c. Select REG, Regular as the Earnings Code using the drop down box.

d. Enter **84.00** as the Hours or Units Per Pay.

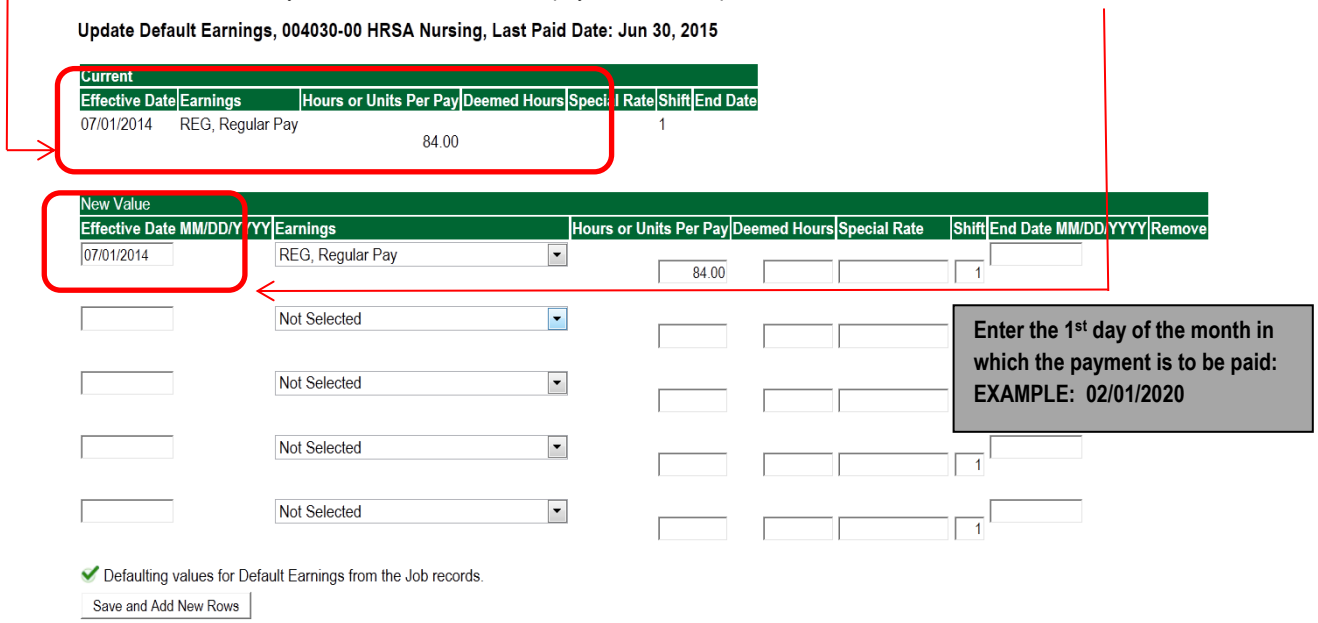
Update Default Earnings, 004026-00 Miscellaneous Position Fund 25

Current						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date

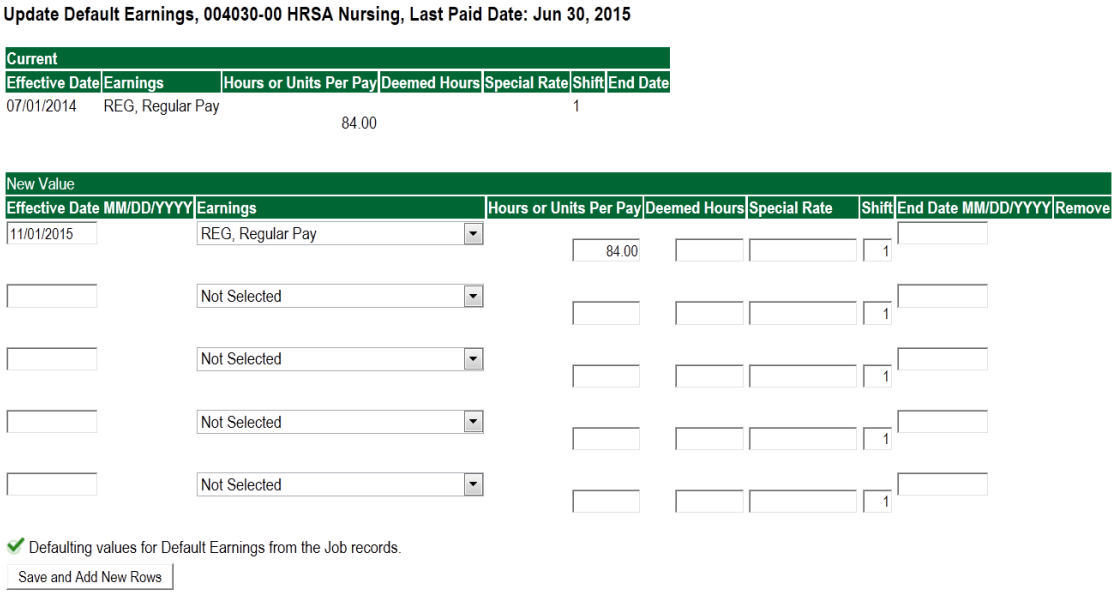
New Value							
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY	Remove
11/01/2015	REG, Regular Pay	84.00			1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		

Save and Add New Rows

If the fields are populated under the **"CURRENT EFFECTIVE DATE"** as shown below, then under the **"NEW VALUE EFFECTIVE DATE"**, enter the 1st day of the month in which the payment is to be paid. MM/01/20__ **EXAMPLE: 02/01/2020**



EXAMPLE OF THE DEFAULT EARNINGS SCREEN WITH THE UPDATED DATE



9. Terminate Employee Job

Field	Statement/Action	Action/Example
Job Effective Date:	Enter the last day of the month in which the payment is to be paid	Ex. 11/30/2020
Job Status:	Field cannot be changed. Information is defaulted.	None
Job Change Reason:	Field cannot be changed. Information is defaulted.	None

Terminate Job Only, 004026-00 Miscellaneous Position Fund 25

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY *		11/30/2015
Job Status: *(Not Enterable)		T
Job Change Reason: *(Not Enterable)		JBEND

Enter the last day of the month in which payment is to be paid. MM/31/20__ or MM/30/20__
EXAMPLE: 02/29/2020

10. Labor Distribution – Update if Needed

a. In the "CURRENT" section – the current labor codes and the effective date of the last change will default into the form.
b. In the "NEW" section – add new rows or make changes to the existing rows.
c. EFFECTIVE DATE: The effective date is the first day of the month in which the payment will be made: MM/01/20__ **EXAMPLE: 02/01/2021**
d. Apply the appropriate changes to the field if necessary.

Steps to change Labor Distributions

1. To remove the default payment information, change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.

Update Labor Distributions, 004026-00 Miscellaneous Position Fund 25

Current
Effective Date: 11/01/2015

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Da

New
Effective Date: MM/DD/YYYY 11/01/2015

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		108601	41211	61300	0605					100.00	

Total: 100.00

Default from Index | Save and Add New Rows

The effective date will default to the query date or today's date. This needs to be change to the following the first day of the month in which the payment is to be paid. MM/01/20__
EXAMPLE: 02/01/2021

Change this percentage to 0.00 and click on Save and Add New Rows.

Update Labor Distributions, 004026-00 Miscellaneous Position Fund 25

Current
Effective Date: 11/01/2015

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

New
Effective Date: MM/DD/YYYY 11/01/2015

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		108601	41211	61300	0605					0.00	

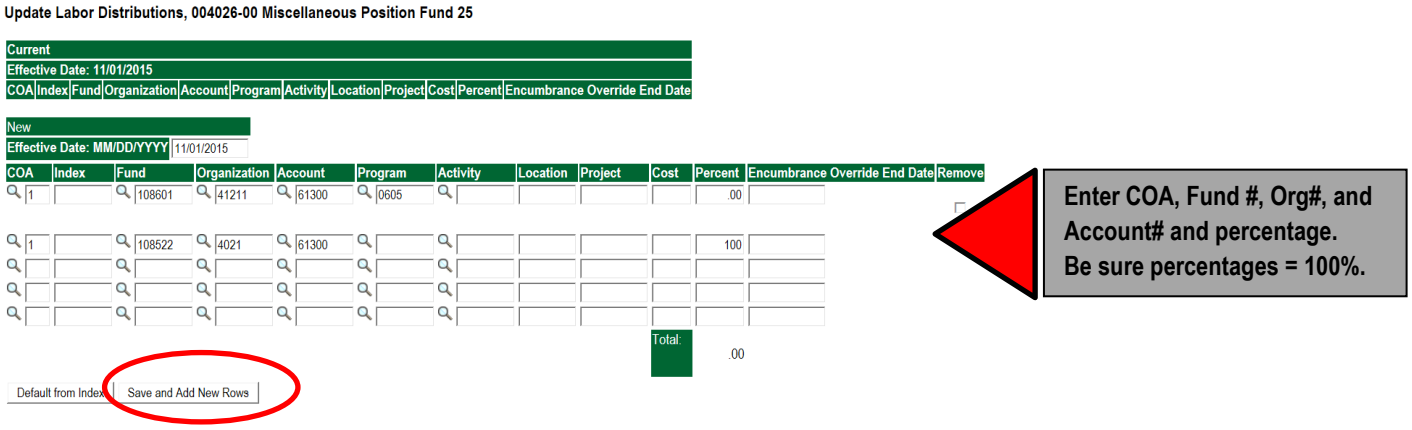
Total: 100.00

Default from Index | Save and Add New Rows

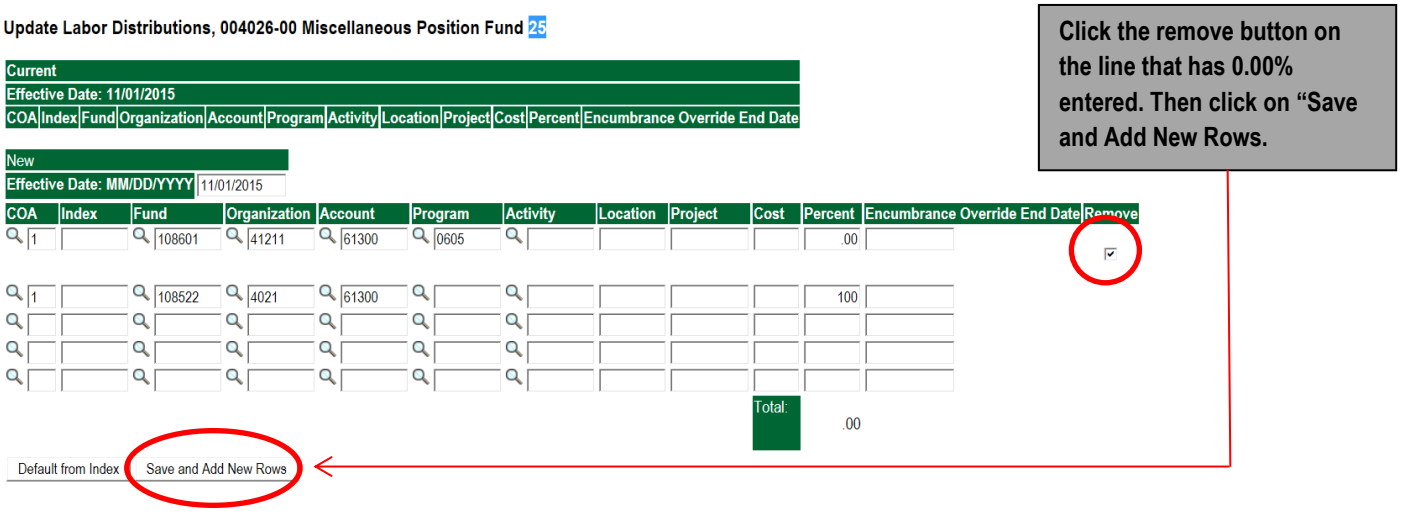
- Enter the new accounting information. The following must be entered for each line.
  a. COA = enter 1.
  b. Fund No.
  c. Organization No.

d. Account No. =
   i. 61100 = Administrative
   ii. 61200 = Faculty
   iii. 61300 = Paraprofessional
   iv. 61400 = Secretarial/Clerical
   v. 61500 = Technical
   vi. 61600 = Skilled Craft
   vii. 61700 = Service Maintenance
e. Percentage = totals must equal 100%. See sample below

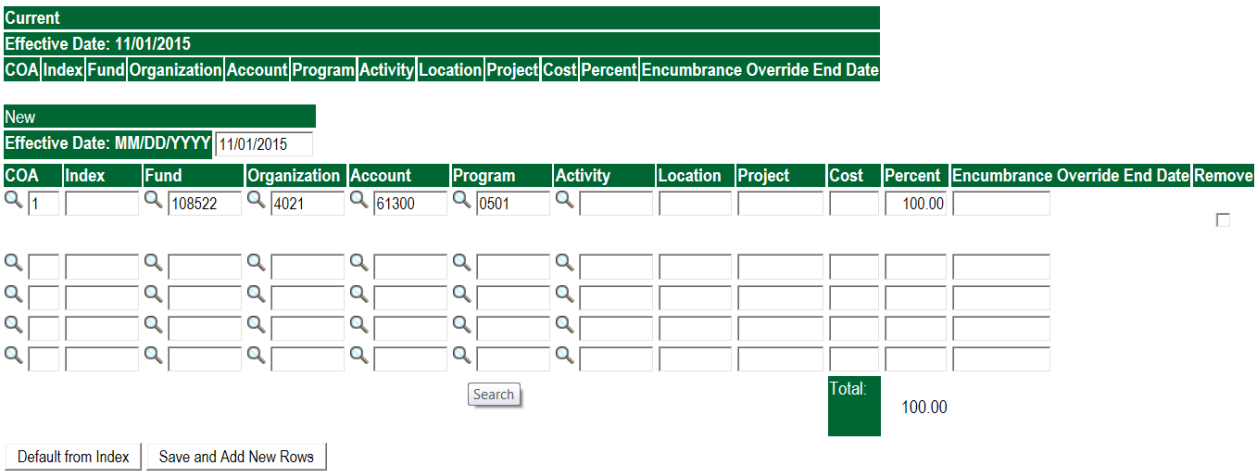
Click to "Save and Add New Rows"



- Click on the box under the "Remove" Column to remove the old accounting information. The percentage should be set 0.00%.
- Click on Save and Add New Rows. The old accounting information should be removed.



Update Labor Distributions, 004026-00 Miscellaneous Position Fund 25



- **Routing Queue**

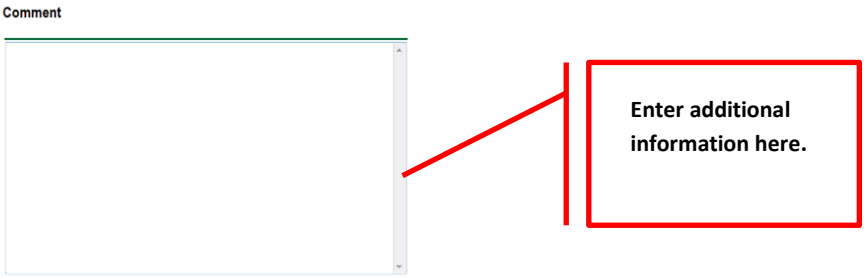
  Non Academic Affairs:

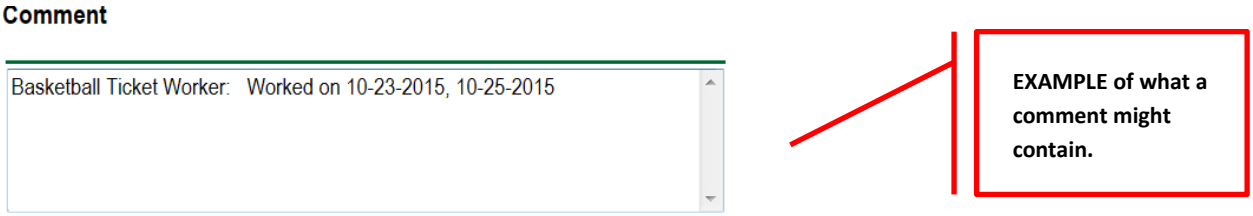
  a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
  b. **All EPAFs must have a Director and Vice President level approval.**
  c. Grants One-Time Payment – Extra Services, **all EPAFS must have a Director, Vice President, Grants, and Grants Budget Office**. This can be added to bottom of the queue. Other approval levels will default.
  d. **EXAMPLE ROUTING QUEUE:**
     i. Dept (Director/Supervisor)
     ii. Vice President
     iii. HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
     iv. Budget = Tonia Walker (TAWALKER)
     v. Payroll = Charlotte Litton (CLITTON)
     vi. HR Director = Lisa Giger (LGIGER)
     vii. Super = Charlotte Litton (CLITTON)

  Academic Affairs

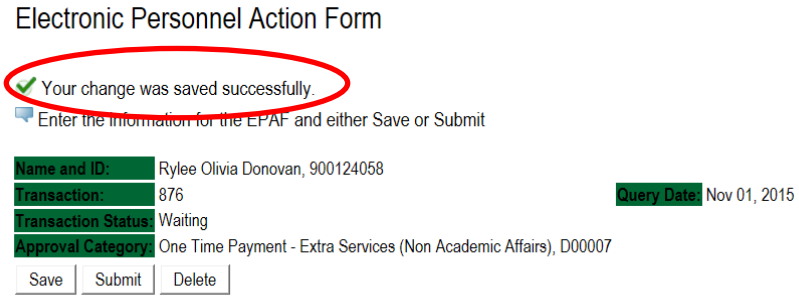
  a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
  b. For Academic One-Time Payment – Extra Services, **all EPAFs must have a Chair and Dean level approval.**
  c. For Academic Grants One-Time Payment – Extra Services, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office**. Other approval levels will default.
  d. For Academic One-Time Payment – Extra Services Continuing Education, add **Dean, Graduate and Continuing Education and Continuing Education (Marilyn Read).** This can be added to the bottom of the queue.
  e. **EXAMPLE ROUTING QUEUE:**
     i. Chair
     ii. Dean
     iii. Academic Affairs = Cheryl Ballard (CBALLARD)
     iv. Provost = Dr. Charles McAdams (CMCADAMS)
     v. HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
     vi. Budget = Tonia Walker (TAWALKER)
     vii. Payroll = Charlotte Litton (CLITTON)
     viii. HR Director = Lisa Giger (LGIGER)
     ix. Super = Charlotte Litton (CLITTON)

6. Click on the **"Save and Add New Rows".**
7. **Comments**
    - In the "Comments" section, enter comments for the approvers with an explanation for the action. Be sure to include the dates when the extra duties occurred.

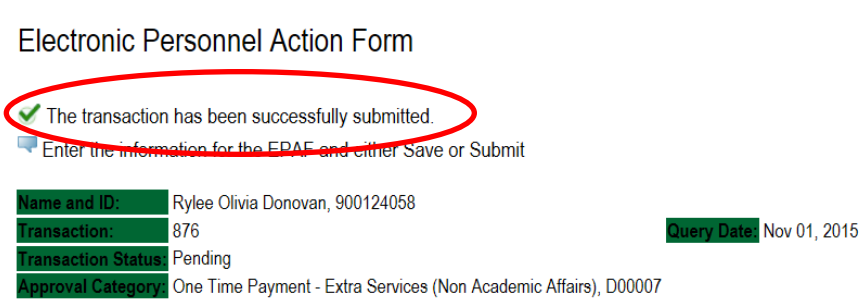




8. **Save EPAF**
    - Hit the "Save" Button at the bottom of the form.
    - Return to the top of the form.
    - The message should display – **"Your change was saved successfully."**
    - Check your date entry



9. **Submit EPAF**
    - Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
    - The EPAF automatically routes to the approvers in the order of their approval levels.



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Errors and Warning Messages

Type	Message Type	Description
Add Employee Job	WARNING	*WARNING* This employee is terminated on the Employee Form.
Add Employee Job	WARNING	*WARNING* The Employee's Term Date and Reason should be removed from PEAEMPL.
Add Employee Job	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
Update Factors, Pays and Hours	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.

* - indicates a required field.

Delete

If an EPAF needs to be re-started, click on the “Delete” button. This will delete the transaction and all you to start over.

TERMINATION/RESIGNATION OF EMPLOYEE
Accessing the EPAF Menu & Approver Summary

Log into Employee Self Service and choose **ELECTRONIC PERSONNEL ACTION FORMS** and then **NEW EPAF.**

This EPAF should only be used to terminate an employee's job when they are leaving the University. It cannot be used if the employee has any other position at the University that will remain active. The steps below should be followed:

1. Enter the employee's 900# or click on the magnifying glass to search for an employee's 900#.
2. The query date will default to today's date. Change the query date to the effective date of the termination/resignation. For example:

   - If an employee's last physical day at work is January 31, 2020, and personal leave time and/or comp are not being used, then January 31, 2020 will be used as the last day of employment and termination/resignation.
   - If an employee's last physical day at work is January 26, 2020, but plan on using personal leave time and/or comp time until January 31, 2020, then January 31, 2020 will be used as the last day of employment and termination/resignation.

3. Select **Termination from DSU (Non Academic Affairs) or Termination from DSU (Academic Affairs)** from the drop down approval category box.

   Non Academic Affairs = *any departments that do not report to the Provost*, but report to other Vice Presidents/Directors. This EPAF is used for changes to positions in departments that do not report to the Provost.

   Academic Affairs = *departments that report to the Provost*. This EPAF is used for changes to faculty/staff positions in departments/divisions that report directly to the provost.

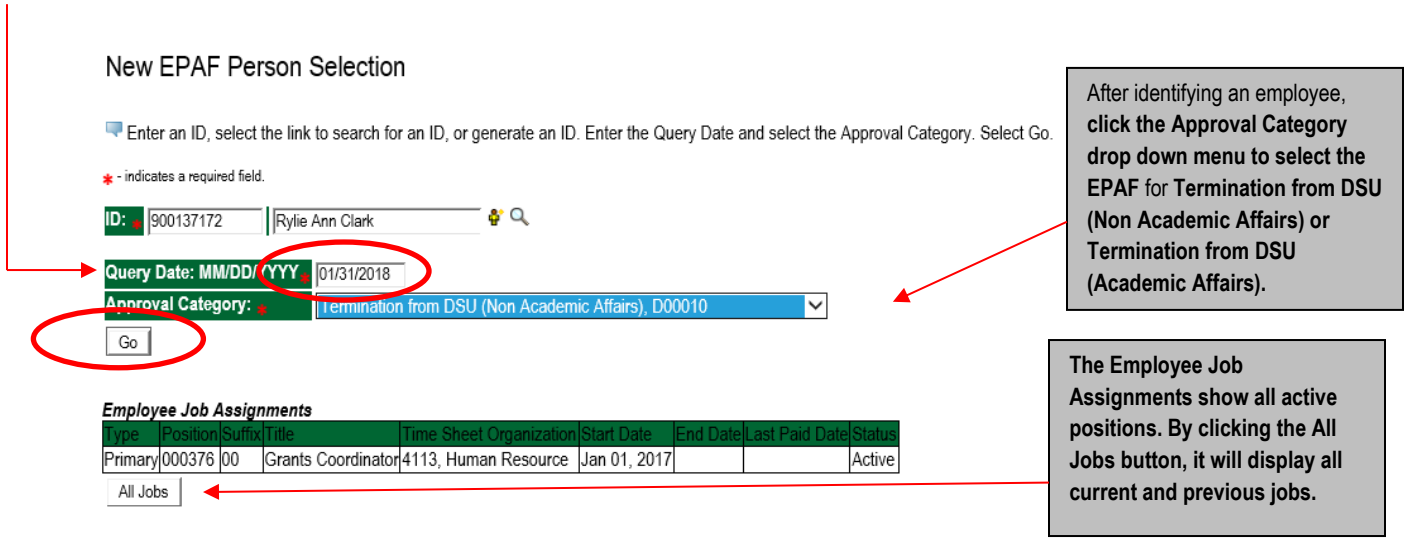
A LETTER OF RESIGNATION MUST BE SUBMITTED FOR ALL EMPLOYEES VOLUNTARILY RESIGNING.

- **ACADEMIC AFFAIRS EMPLOYEE RESIGNATION LETTERS MUST BE SENT TO THE PROVOST'S OFFICE.**
- **NON ACADEMIC AFFAIRS EMPLOYEE RESIGNATION LETTERS MUST BE SENT TO HUMAN RESOURCES.**

TERMINATION/RESIGNATION PROCESS FOR INDIVIDUALS WHO ARE CLASSIFIED AS 12 MONTH EMPLOYEES.
Use for both Monthly & Bi-Weekly employees

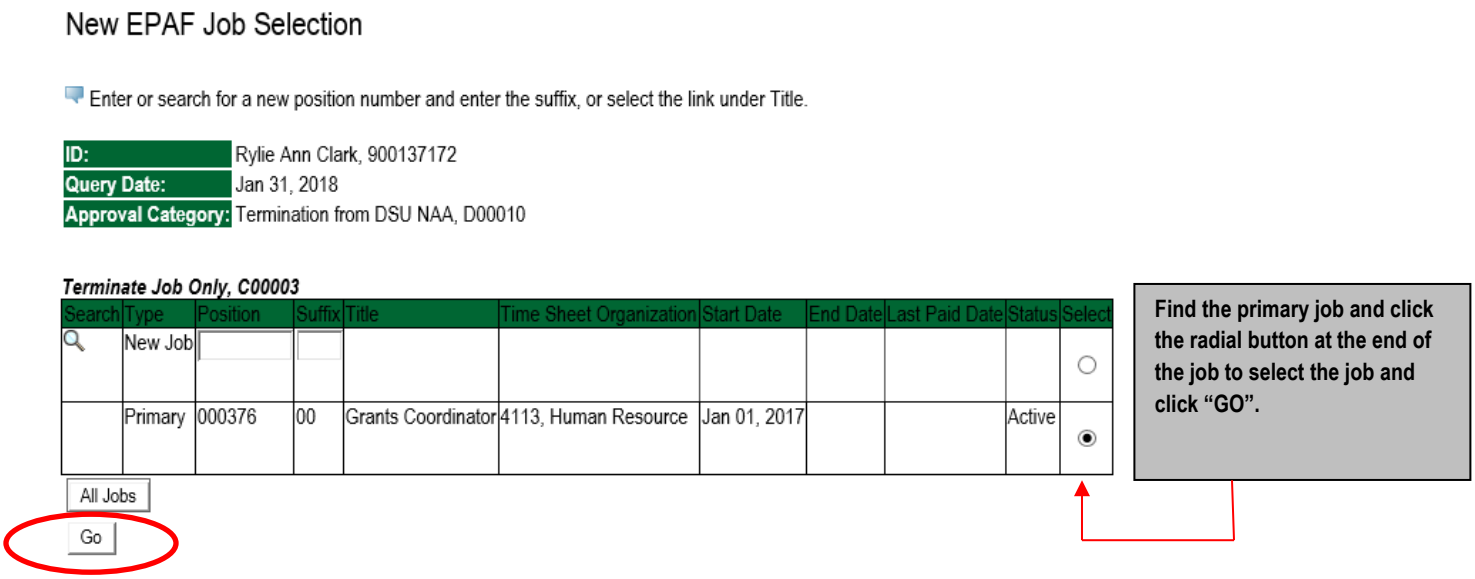
!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DAY YOU WANT THE END THE PAY FOR THE EMPLOYEE WHO IS LEAVING AND NOT THE LAST DAY THE EMPLOYEE IS IN THE OFFICE. IF IT IS NOT SET TO THE CORRECT DATE, THE EMPLOYEE WILL EITHER BE PAID TOO OR MUCH OR NOT ENOUGH.

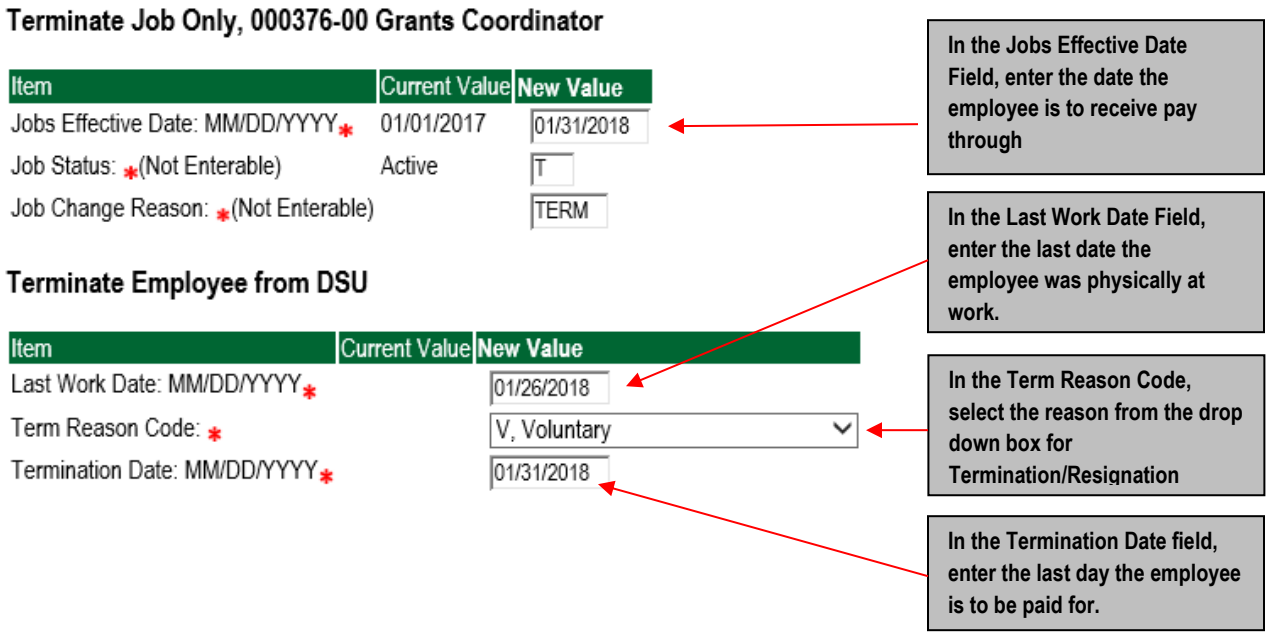


4. Click on **GO** to begin processing the EPAF.

5. Click the radial button at the end of the row for the **PRIMARY JOB** and click **GO.**



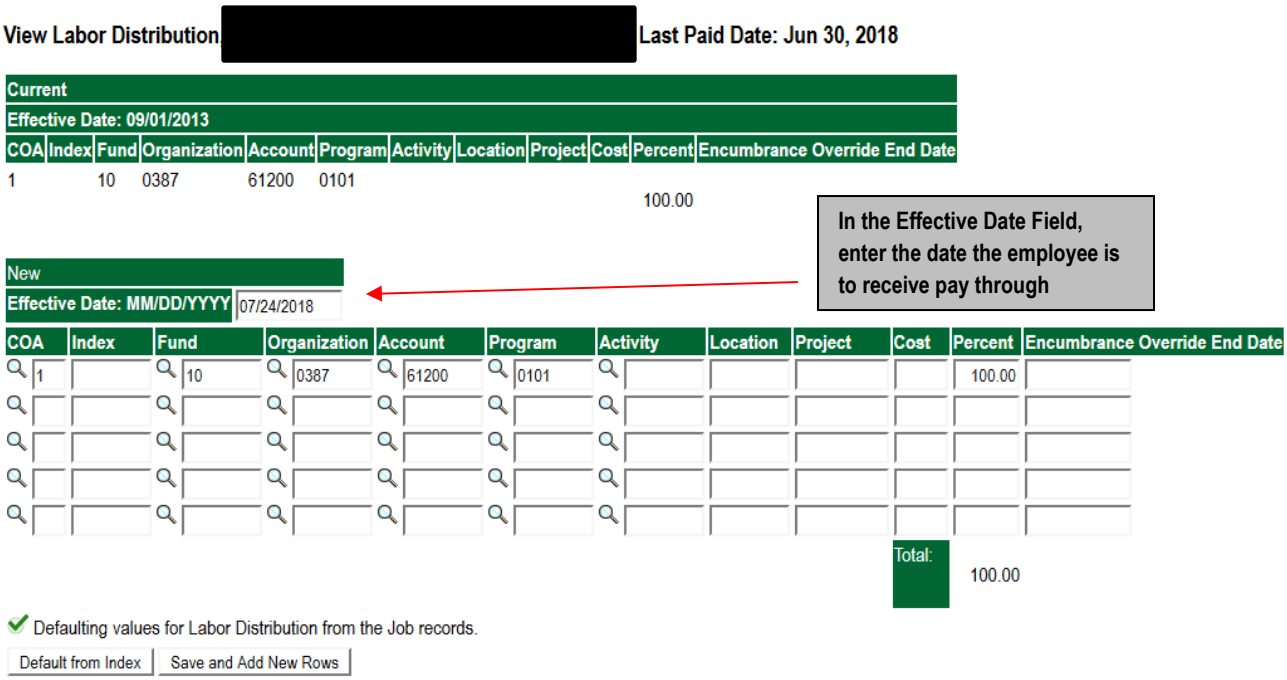
6. In the Jobs Effective Date field, enter the date the employee is to receive pay through.
7. In the Last Work Date field, enter the last day the employee was physically at work
8. In the Term Reason Code field, select the reason for termination/resignation by using the drop down box.
9. In the Termination Date field, enter the last day the employee is to receive pay through.



10. In the Jobs Effective Date field, enter the date the employee is to receive pay through.

11. Leave the New Value blank for Regular Rate and Annual Salary

12. In the Effective Date in the New section, enter the date the employee is to receive pay through.



13. Routing Queue

Non Academic Affairs:

a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.

b. **All EPAFs must have a Director and Vice President level approval.**

c. Grants Termination from DSU, **all EPAFS must have a Director, Vice President, Grants, and Grants Budget Office,** This can be added to bottom of the queue. Other approval levels will default.

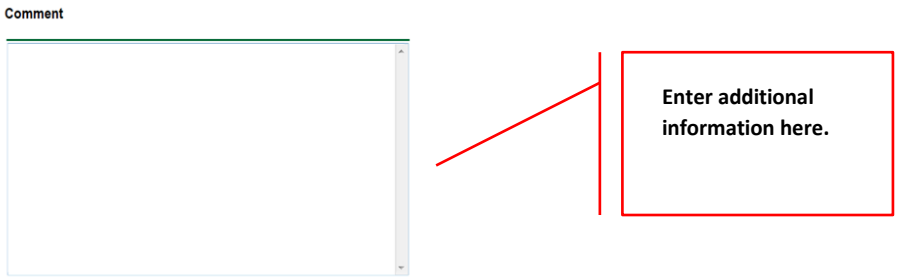
d. EXAMPLE ROUTING QUEUE:

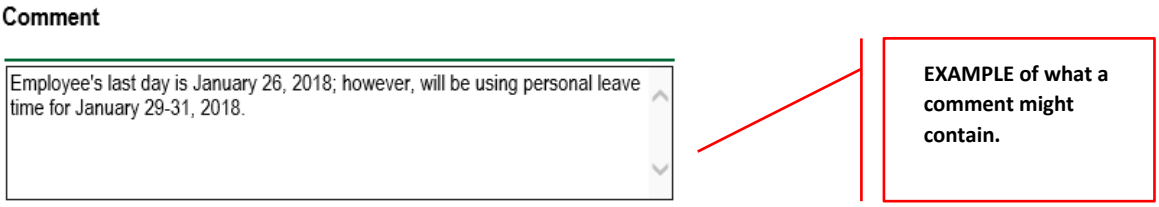
i. Dept (Director/Supervisor)
ii. Vice President
iii. HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
iv. Budget = Tonia Walker (TAWALKER)
v. Payroll FYI = Charlotte Litton (CLITTON)
vi. HR2 = Rachel Becker (RBECKER for employees paid monthly) or Rebecca Bouse (RBOUSE for employees paid bi-weekly)
vii. HR Director = Lisa Giger (LGIGER)
viii. Super = Charlotte Litton (CLITTON)

Academic Affairs

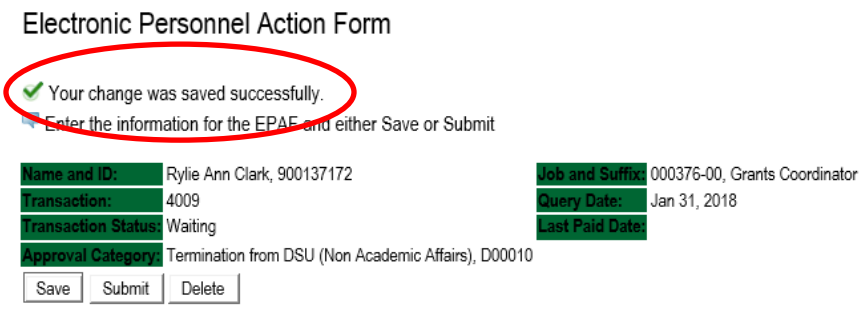
a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
b. For Academic Termination from DSU, **all EPAFs must have a Chair and Dean level approval.**
c. For Academic (Grants) Termination from DSU, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office,** Other approval levels will default.
d. **EXAMPLE ROUTING QUEUE:**
    i. Chair
    ii. Dean
    iii. Academic Affairs = Cheryl Ballard (CBALLARD)
    iv. Provost = Dr. Charles McAdams (CMCADAMS)
    v. HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
    vi. Budget = Tonia Walker (TAWALKER)
    vii. Payroll FYI = Charlotte Litton (CLITTON)
    viii. HR2 = Rachel Becker (RBECKER for employees paid monthly) or Rebecca Bouse (RBOUSE for employees paid bi-weekly)
    ix. HR Director = Lisa Giger (LGIGER)
    x. Super = Charlotte Litton (CLITTON)

11. Click on the **"Save and Add New Rows".**
12. **Comments**
    - In the "Comments" section, enter comments for the approvers with an explanation for the action.

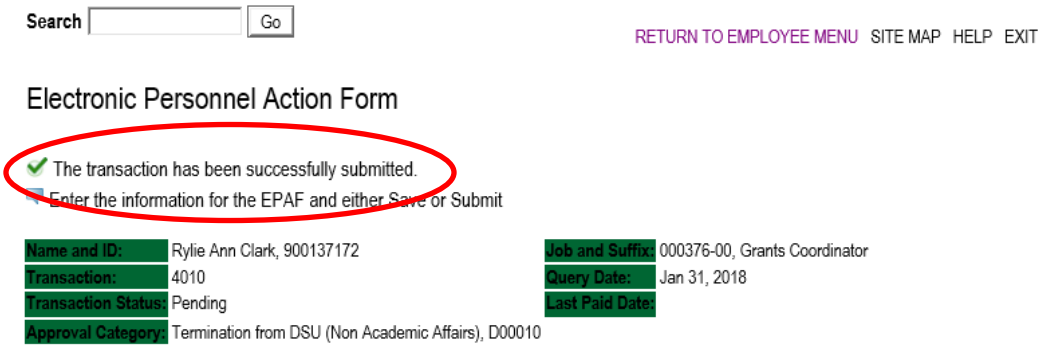




13. **Save EPAF**
    - Hit the "Save" Button at the bottom of the form.
    - Return to the top of the form.
    - The message should display – **"Your change was saved successfully."**
    - Check your date entry



14. **Submit EPAF**
    - Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
    - The EPAF automatically routes to the approvers in the order of their approval levels.



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Delete

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

TERMINATION/RESIGNATION PROCEDURE FOR INDIVIDUALS WHO ARE 9 MONTH EMPLOYEES

FACULTY EMPLOYEES

1. A faculty member who terminates/resigns at the end of the academic session, then the following dates must be used.

   F1 Employee Class: The job effective date will be ended on August 31, 2021; however, the last work date will be May 7, 2021 or the last day of the academic session.

   F2 Employee Class: The job effective date will be ended on May 31, 2021; however, the last work date will be May 7, 2021 or the last day of the academic session.

A LETTER OF RESIGNATION MUST BE SENT TO THE PROVOST'S OFFICE FOR ALL EMPLOYEES VOLUNTARILY RESIGNING.

EXAMPLE OF A TERMINATION/RESIGNATION OF AN F1 EMPLOYEE TERMINATION

View Employee Employment Class

Item	Current Value	New Value
Employee Class Code: (Not Enterable)	F1, Faculty 9/12	
Employee Status: *(Not Enterable)	Active	A

Terminate Job Only, [redacted] **Last Paid Date: Jan 31, 2017**

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	09/01/2015	08/31/2018
Job Status: *(Not Enterable)	Active	T
Job Change Reason: *(Not Enterable)	PROMO	TERM

Terminate Employee from DSU

Item	Current Value	New Value
Last Work Date: MM/DD/YYYY*		05/07/2018
Term Reason Code: *		V, Voluntary
Termination Date: MM/DD/YYYY*		08/31/2018

EXAMPLE OF A TERMINATION/RESIGNATION OF AN F2 EMPLOYEE TERMINATION

View Employee Employment Class

Item	Current Value	New Value
Employee Class Code: (Not Enterable)	F2, Faculty 9/9	
Employee Status: *(Not Enterable)	Active	A

Terminate Job Only, [redacted] **Last Paid Date: Jan 31, 2017**

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	09/01/2015	05/31/2018
Job Status: *(Not Enterable)	Active	T
Job Change Reason: *(Not Enterable)	RAISE	TERM

Terminate Employee from DSU

Item	Current Value	New Value
Last Work Date: MM/DD/YYYY*		05/07/2018
Term Reason Code: *		V, Voluntary
Termination Date: MM/DD/YYYY*		05/31/2018

TITLE AND/OR SALARY ADJUSTMENT FOR EMPLOYEE
Accessing the EPAF Menu & Approver Summary

Log into Employee Self Service and choose **ELECTRONIC PERSONNEL ACTION FORMS** and then **NEW EPAF.**

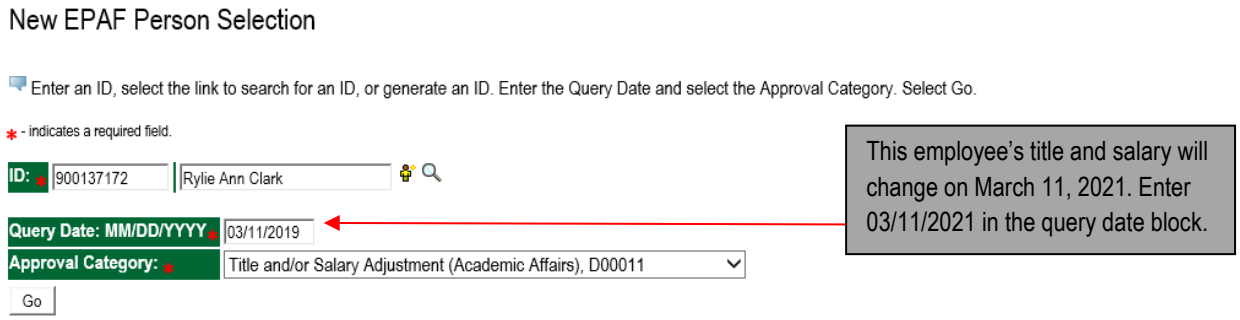
This EPAF should only be used to change the title and/or salary of a salaried employee's **PRIMARY** job or additional job duties currently set-up in Banner. It cannot be used if the employee is transferring to another position on campus.

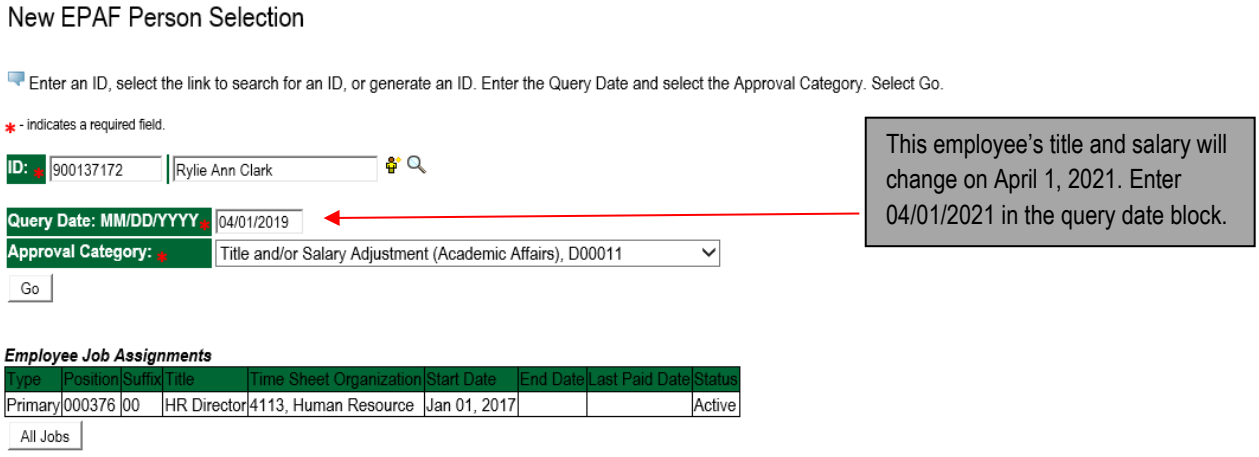
This should not be used to temporarily increase an employee's salary. You should use One Time Payment – Extra Services (Non Academic Affairs) – D00007 or One Time Payment – Extra Services (Academic Affairs) – D00008.

The steps below should be followed:

1. Enter the employee's 900# or click on the magnifying glass to search for an employee's 900#.
2. The query date will default to today's date. Change the query date to the effective date of the title and/or salary change. For example:

    - If the change is to take place on any day of the month, then use the date the change will take place. If the change is to take place on the 1st day of the month, then use the first day of the month. See examples below.



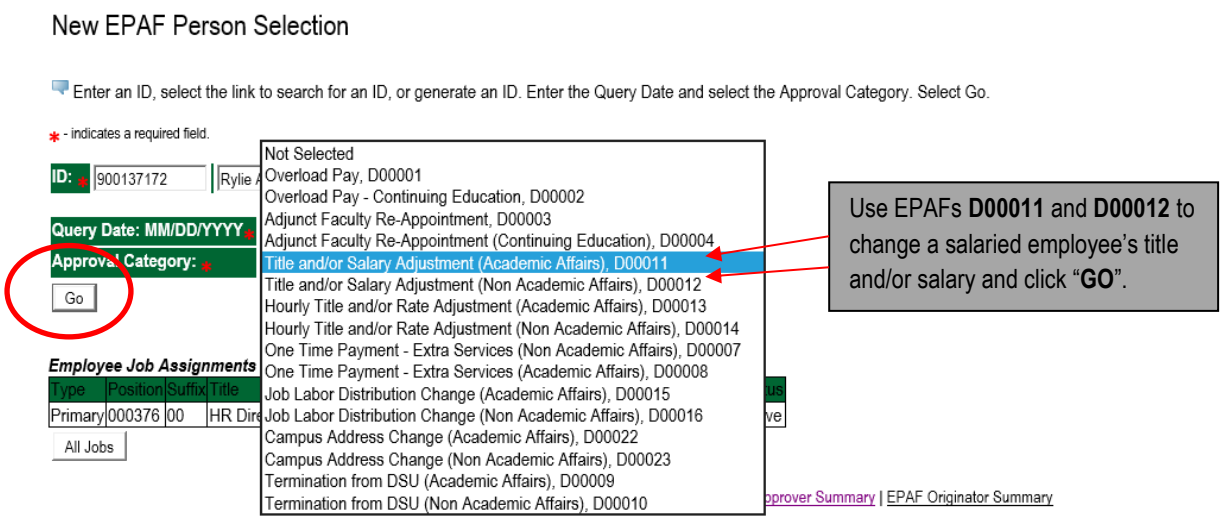


3. Select **Title and/or Salary Adjustment (Academic Affairs) {D00011} or Title and/or Salary Adjustment (Non Academic Affairs) {D00012}** from the drop down approval category box.

    Academic Affairs = *departments that report to the Provost*. This EPAF is used for changes to faculty/staff positions in departments/divisions that report directly to the provost.
    Non Academic Affairs = *any departments that do not report to the Provost*, but report to other Vice Presidents/Directors. This EPAF is used for changes to positions in departments that do not report to the Provost.

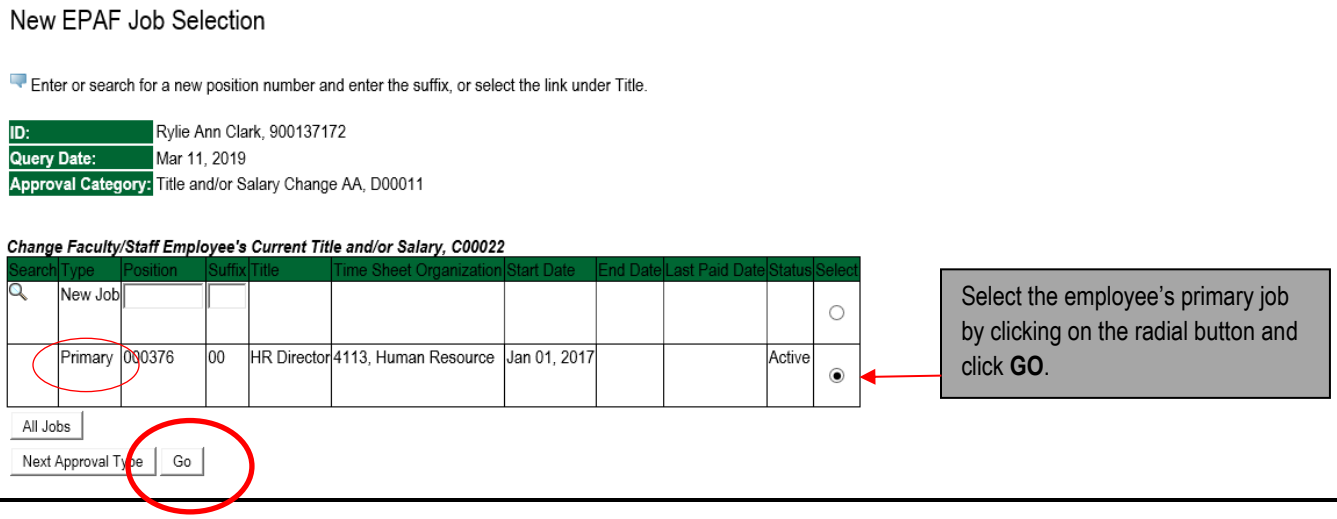
CHANGES TO TITLE AND/OR SALARY MUST HAVE SUPPORTING DOCUMENTATION AND FORWARDED TO OFFICE OF HUMAN RESOURCES.

HOURLY TITLE AND/OR RATE ADJUSTMENTS ARE COMPLETED ON EPAFs D00013 AND D00014.



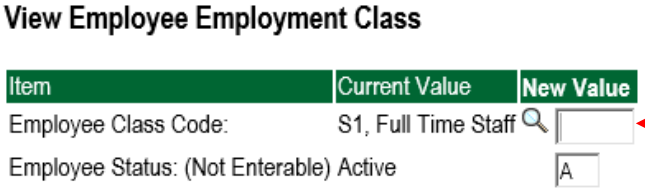
4. Click the radial button at the end of the row for the **PRIMARY JOB** and click **GO.** A new job should not be entered using this EPAF.

5. Click on **GO** to begin processing the EPAF.



6. Change the **Employee Class Code** <u>only</u> if an employee is changing to either part-time or full-time status. See codes below.

Employee Code	Description
F1	Faculty employed for 9 months but paid over 12
F2	Faculty employed for 9 months and paid over 9
F4	Faculty employed for 12 months and paid over 12
S1	Full-time Staff
S3	Part-time staff, no benefits
S4	Part-time staff less than 40 hours per week, with benefits



If an employee is changing to part-time or full-time status, select the appropriate employee code from the table above.

Enter employee code in the **Employee Class Code** block.

For example:

- Full-time staff employee is changing from 40 hours per week to 25 hours per week, then enter code **S4.**
- Part-time employee is changing from working 30 hours per week to 40 hours per week, then enter code **S1.**
- Employment status is not changing = leave blank

---

7. **Change faculty/staff employee's current title and/or salary.**

   a. **JOB BEGIN DATE:** No entry – leave blank

   b. **JOB EFFECTIVE DATE:** Enter the effective date of the salary and/or title change.

   c. **PERSONNEL DATE:** Enter the effective date of the salary and/or title change.

   d. **JOB STATUS:** No entry – leave blank

   e. **TITLE:** Enter employee's new title, if applicable. If title is not changing, leave blank.

   f. **FTE:** Enter "1" if the FTE is not changing and employee is working 40 hours per week. If employee is working less than 40 hours per week, enter the new FTE. To figure new FTE, divide hours work per week by 40.

      For example: Employee will change from working 40 hours per week to working 25 hours per week. To figure new FTE, divided 25 by 40 = .63 (25 / 40). Enter .63 in the FTE field.

   g. **JOB CHANGE REASON:** Select the reason for change using the drop down menu. (i.e. Title change – TITLE, receiving a promotion – PROMO, etc.)

   h. **ANNUAL SALARY:** Enter employee's new annual salary, if applicable. If salary is not changing, leave blank.

   i. **FACTOR:** Most employees received their annual salary over 12 months. If the number of months are changing, then enter the number the pay is to be divided by. This should match the number that will be listed in the **PAYS** field.

   j. **PAYS:** Most employees received their annual salary over 12 months. If the number of months are changing, then enter the number the pay is to be divided by. This should match the number listed in the **FACTOR** field.

      If salary is to be paid over 12 months, then leave the **FACTOR** and **PAYS** fields blank.

EMPLOYEE'S TITLE AND SALARY CHANGE

Change Faculty/Staff Employee's Current Title and/or Salary, 000376-00 HR Director

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	01/01/2017	
Jobs Effective Date: MM/DD/YYYY *	03/01/2018	
Personnel Date: MM/DD/YYYY *	03/01/2018	
Job Status: (Not Enterable)	Active	A
Title:	HR Director	
FTE: *	1	
Job Change Reason: *	PROMO	Not Selected
Annual Salary:	54000	
Factor:	12	
Pays:	12	

:

EXAMPLE 1: Title and Salary Change

Change Faculty/Staff Employee's Current Title and/or Salary, 000376-00 HR Director

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	01/01/2017	
Jobs Effective Date: MM/DD/YYYY *	03/01/2018	03/11/2019
Personnel Date: MM/DD/YYYY *	03/01/2018	03/11/2019
Job Status: (Not Enterable)	Active	A
Title:	HR Director	VP for Human Resources
FTE: *	1	1.00
Job Change Reason: *	PROMO	PROMO, Promotion
Annual Salary:	54000	60000.00
Factor:	12	
Pays:	12	

An employee's title and salary is changing on March 11, 2019, from Director of Human Resources to Vice President for Human Resources. Salary is changing from $54,000 to $60,000. EMPLOYEE CLASS, FTE, FACTOR and PAYS are not changing. Employee is considered full-time, 40 hours per week.

The EPAF will be entered using the following information:

Employee Class Code: no change needed. Employment status is not changing.

Job Begin Date: No entry
Job Effective Date: 03/11/2019
Job Personnel Date: 03/11/2019
Job Status: No entry
Title: VP for Human Resources
FTE: 1.00
Job Change Reason: Promo (enter reason for change using the drop down menu.)
Annual Salary: 60000.00
Factor: no entry unless the factor and pays change
Pays: no entry unless the factor and pays change

SEE EXAMPLE 1 AT LEFT.

EXAMPLE 2: Title, Salary, and FTE Change

View Employee Employment Class

Item	Current Value	New Value
Employee Class Code:	S1, Full Time Staff	S4
Employee Status: (Not Enterable)	Active	A

Change Faculty/Staff Employee's Current Title and/or Salary, 000376-00 HR Director

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	01/01/2017	
Jobs Effective Date: MM/DD/YYYY *	03/01/2018	04/01/2019
Personnel Date: MM/DD/YYYY *	03/01/2018	04/01/2019
Job Status: (Not Enterable)	Active	A
Title:	HR Director	HR Supervisor
FTE: *	1	0.63
Job Change Reason: *	PROMO	TITLE, Title Change
Annual Salary:	54000	2500
Factor:	12	12
Pays:	12	12

Employee is changing on March 1, 2019 from a full-time, 40 hour per week, employee with the title of HR Director, to a part-time employee working 25 hours per week with the title HR Supervisor. The salary is changing from $54,000 to $25,000 accordingly. This is a permanent change.

The EPAF will be entered using the following information:

EMPLOYEE CLASS CODE: S4

Job Begin Date: No entry
Job Effective Date: 04/01/2019
Job Personnel Date: 04/01/2019
Job Status: No entry
Title: HR Supervisor
FTE: .63 (25hrs / 40hrs)
Job Change Reason: Promo (enter reason for change using the drop down menu)
Annual Salary: 25000.00
Factor: 12
Pays: 12

EXAMPLE 3: Title and Salary Change, Time-Limited Basis

This will generally only be used for grant-funded positions in which the fund/org/acct change each grant year.

When entering a change that is time-limited, you will need to enter a permanent change (with Factor 12 and Pays 12) or a second time-limited change that will take effect after the time-limited change ends or the job will end and the employee will not be paid.

View Employee Employment Class

Item	Current Value	New Value
Employee Class Code:	S1, Full Time Staff	S1
Employee Status: (Not Enterable)	Active	A

Change Faculty/Staff Employee's Current Title and/or Salary, 000376-00 HR Director

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	01/01/2017	
Jobs Effective Date: MM/DD/YYYY*	03/01/2018	04/01/2019
Personnel Date: MM/DD/YYYY*	03/01/2018	04/01/2019
Job Status: (Not Enterable)	Active	A
Title:	HR Director	MSSP Grant HR Director
FTE: *	1	1.0
Job Change Reason: *	PROMO	PROMO, Promotion
Annual Salary:	54000	25000
Factor:	12	5
Pays:	12	5

Employee is paid from a grant whose fiscal year ends on August 31, 2019. The salary listed for the remainder of the grant, April 1, 2019 through August 31, 2019, is $25,000. This change is time-limited because it only is in effect from April through August 2019. The employee's title is changing to MSSP Grant HR Director to reflect job duties.

The EPAF will be entered using the following information:

EMPLOYEE CLASS CODE: S1

Job Begin Date: No entry
Job Effective Date: 04/01/2019
Job Personnel Date: 04/01/2019
Job Status: No entry
Title: MSSP Grant HR Director
FTE: 1.0 (no change)
Job Change Reason: Promo (enter reason for change using the drop down menu)
Annual Salary: 25000.00
Factor: 5
Pays: 5

SEE EXAMPLE 3 AT LEFT.

TITLE CHANGE ONLY: Complete the following fields:

- Job Effective Date
- Personnel Date
- Title
- FTE
- Job Change Reason (Title)

Change Faculty/Staff Employee's Current Title and/or Salary, 000376-00 HR Director

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	01/01/2017	
Jobs Effective Date: MM/DD/YYYY*	03/01/2018	04/01/2019
Personnel Date: MM/DD/YYYY*	03/01/2018	04/01/2019
Job Status: (Not Enterable)	Active	A
Title:	HR Director	Interim VP HR
FTE: *	1	1.00
Job Change Reason: *	PROMO	PROMO, Promotion
Annual Salary:	54000	
Factor:	12	
Pays:	12	

SALARY CHANGE ONLY: Complete the following fields

- Employee Class Code (if applicable)
- Job Effective Date
- Personnel Date
- FTE (if applicable)
- Job Change Reason (Promo or Raise)
- Annual Salary
- Factor (if applicable)
- Pays (if applicable)

EXAMPLE 1: Salary Change Only

Change Faculty/Staff Employee's Current Title and/or Salary, 000376-00 HR Director

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	01/01/2017	
Jobs Effective Date: MM/DD/YYYY *	03/01/2018	04/01/2019
Personnel Date: MM/DD/YYYY *	03/01/2018	04/01/2019
Job Status: (Not Enterable)	Active	A
Title:	HR Director	
FTE: *	1	1.00
Job Change Reason: *	PROMO	PROMO, Promotion
Annual Salary:	54000	60000.00
Factor:	12	
Pays:	12	

EXAMPLE 2: Change in Salary and Hours Worked

View Employee Employment Class

Item	Current Value	New Value
Employee Class Code:	S1, Full Time Staff	S4
Employee Status: (Not Enterable)	Active	A

Change Faculty/Staff Employee's Current Title and/or Salary, 000376-00 HR Director

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	01/01/2017	
Jobs Effective Date: MM/DD/YYYY *	03/01/2018	04/01/2019
Personnel Date: MM/DD/YYYY *	03/01/2018	04/01/2019
Job Status: (Not Enterable)	Active	A
Title:	HR Director	
FTE: *	1	0.63
Job Change Reason: *	PROMO	PROMO, Promotion
Annual Salary:	54000	25000
Factor:	12	
Pays:	12	

8. TERMINATE JOB ONLY

If the employee's job factor and pays are 12, the salary is paid on a monthly basis, and the salary is not ending after a period of time, then enter the same date as the effective date of action in the **TERMINATE JOB ONLY: Jobs Effective Date.** See Example 1 below.

EXAMPLE 1: Permanent change in Title and/or Salary

View Employee Employment Class

Item	Current Value	New Value
Employee Class Code:	S1, Full Time Staff	
Employee Status: (Not Enterable)	Active	A

Change Faculty/Staff Employee's Current Title and/or Salary, 000376-00 HR Director

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	01/01/2017	
Jobs Effective Date: MM/DD/YYYY *	03/01/2018	04/01/2019
Personnel Date: MM/DD/YYYY *	03/01/2018	04/01/2019
Job Status: (Not Enterable)	Active	A
Title:	HR Director	VP Human Resources
FTE: *	1	1.
Job Change Reason: *	PROMO	PROMO, Promotion
Annual Salary:	54000	60000
Factor:	12	
Pays:	12	

Terminate Job Only, 000376-00 HR Director

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	03/01/2018	4/01/2019
Job Status:	Active	Not Selected
Job Change Reason:	PROMO	Not Selected

Employee's title and salary is changing on their primary job. The title and salary will continue.

The EPAF will be entered using the following information:

EMPLOYEE CLASS CODE: No entry

Job Begin Date: No entry
Job Effective Date: 04/01/2019
Job Personnel Date: 04/01/2019
Job Status: No entry
Title: VP Human Resources
FTE: No Entry
Job Change Reason: Promo (enter reason for change using the drop down menu)
Annual Salary: 60,000
Factor: No entry
Pays: No entry

TERMINATE JOB ONLY:

Jobs Effective Date: 04/01/2019
Job Status: No entry – leave as Not Selected
Job Change Reason: No entry – leave as Not Selected

If the salary will end after a certain period of time, process the EPAF according to the Example 2 below. A new EPAF will need to be created to extend payment or to enter an additional payment past the factor and pays date. In Example 2 below, a termination date will need to be enter to end the salary on August 31, 2019 since the payment and the factor was 5. The job began on April 1, 2019 and will end on August 31, 2019.

This will mainly be used in cases of grants where the funding year will end on a certain date and the next grant year will have a different Fund/Org/Acct number.

EXAMPLE 2:

View Employee Employment Class

Item	Current Value	New Value
Employee Class Code:	S1, Full Time Staff	
Employee Status: (Not Enterable)	Active	A

Change Faculty/Staff Employee's Current Title and/or Salary, 000376-00 HR Director

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	01/01/2017	
Jobs Effective Date: MM/DD/YYYY*	03/01/2018	04/01/2019
Personnel Date: MM/DD/YYYY*	03/01/2018	04/01/2019
Job Status: (Not Enterable)	Active	A
Title:	HR Director	MSSP Grant HR Director
FTE: *	1	1.0
Job Change Reason: *	PROMO	PROMO, Promotion
Annual Salary:	54000	25000
Factor:	12	5
Pays:	12	5

Terminate Job Only, 000376-00 HR Director

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	03/01/2018	08/31/2019
Job Status:	Active	Terminated
Job Change Reason:	PROMO	JBEND, Job Ends

Employee's salary is ending on August 31, 2019. Additional funds will be identified before or after August 31, 2019 to continue to pay the employee. The Employee is NOT leaving the University.

The EPAF will be entered using the following information:

EMPLOYEE CLASS CODE: S4

Job Begin Date: No entry
Job Effective Date: 04/01/2019
Job Personnel Date: 04/01/2019
Job Status: No entry
Title: Interim VP HR
FTE: .63 (25hrs / 40hrs)
Job Change Reason: Promo (enter reason for change using the drop down menu)
Annual Salary: 25000.00
Factor: 5
Pays: 5

TERMINATE JOB ONLY:

Jobs Effective Date: 08/31/2019
Job Status: Terminated
Job Change Reason: JBEND

The title and salary changed on April 1, 2019 and will end on August 31, 2019. The salary is paid over 5 installments.

IF AN EMPLOYEE IS LEAVING THE UNIVERSITY, USE THE FOLLOWING EPAFS:

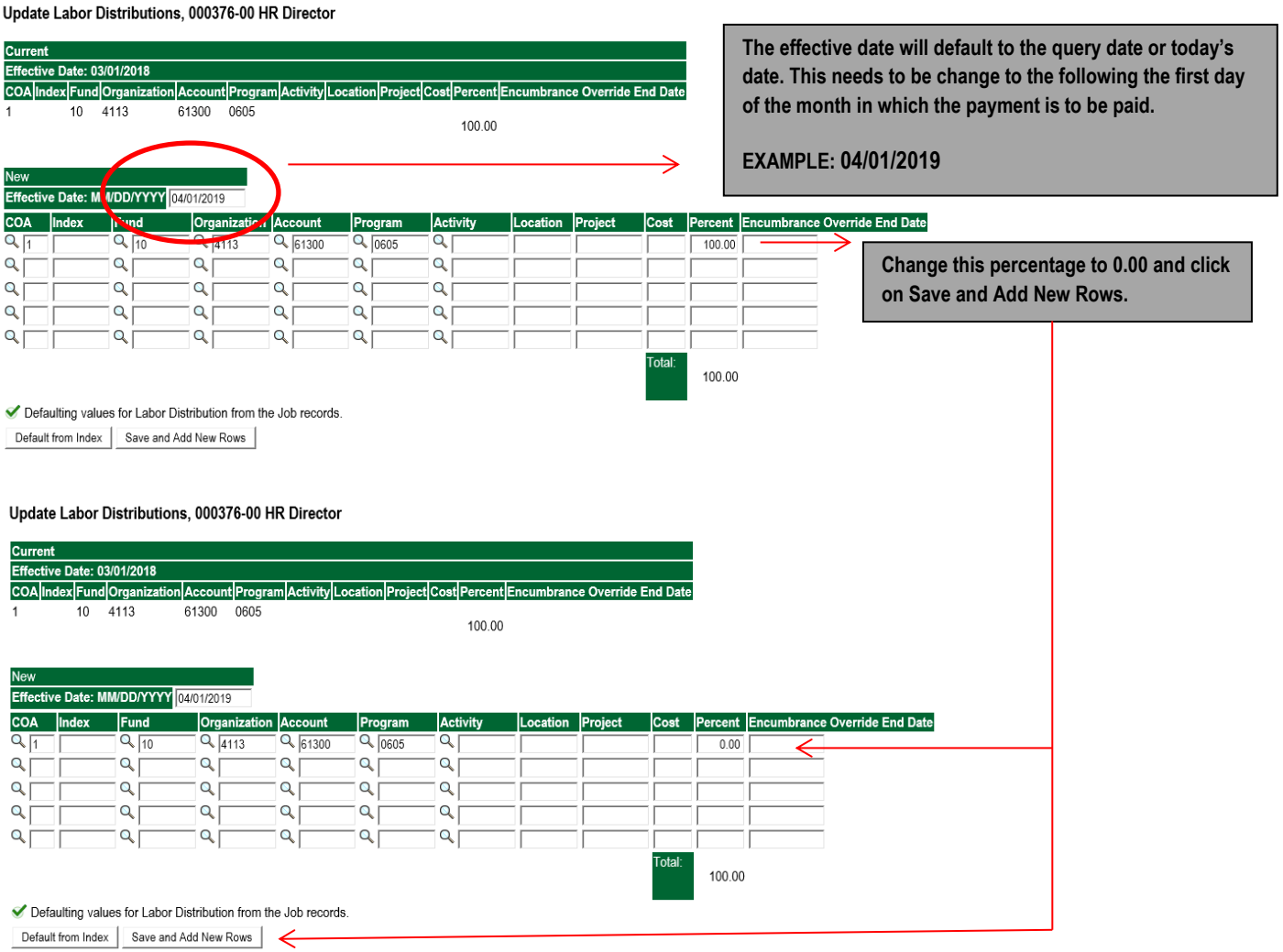
- **TERMINATION FROM DSU (ACADEMIC AFFAIRS) [D00009]**
- **TERMINATION FROM DSU (NON ACADEMIC AFFAIRS) [D00010].**

9. UPDATE LABOR DISTRIBUTION – If Needed

a. In the "CURRENT" section – the current labor codes and the effective date of the last change will default into the form.
b. In the "NEW" section – add new rows or make changes to the existing rows.
c. EFFECTIVE DATE: The effective date is the first day of the month in which the payment will be made: MM/01/20__
EXAMPLE: 04/01/2019
d. Apply the appropriate changes to the field if necessary.

Steps to change Labor Distributions

- To remove the default payment information, change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.

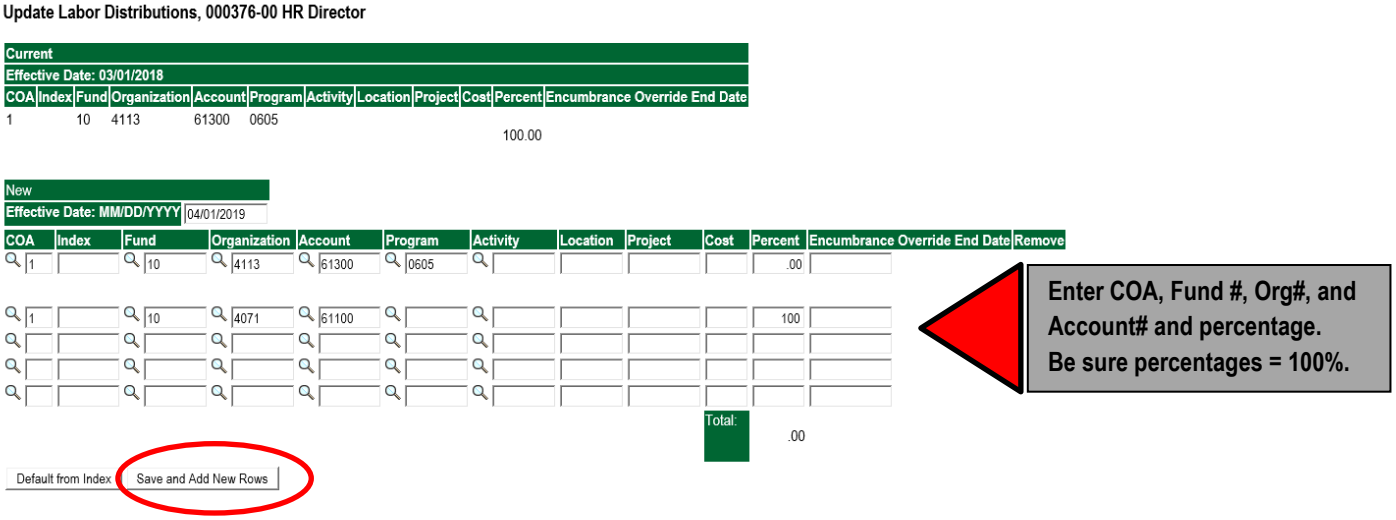


- Enter the new accounting information. The following must be entered for each line.
  a. COA = enter 1.
  b. Fund No.
  c. Organization No.
  d. Account No. =
    i. 61100 = Administrative
    ii. 61200 = Faculty
    iii. 61300 = Paraprofessional
    iv. 61400 = Secretarial/Clerical

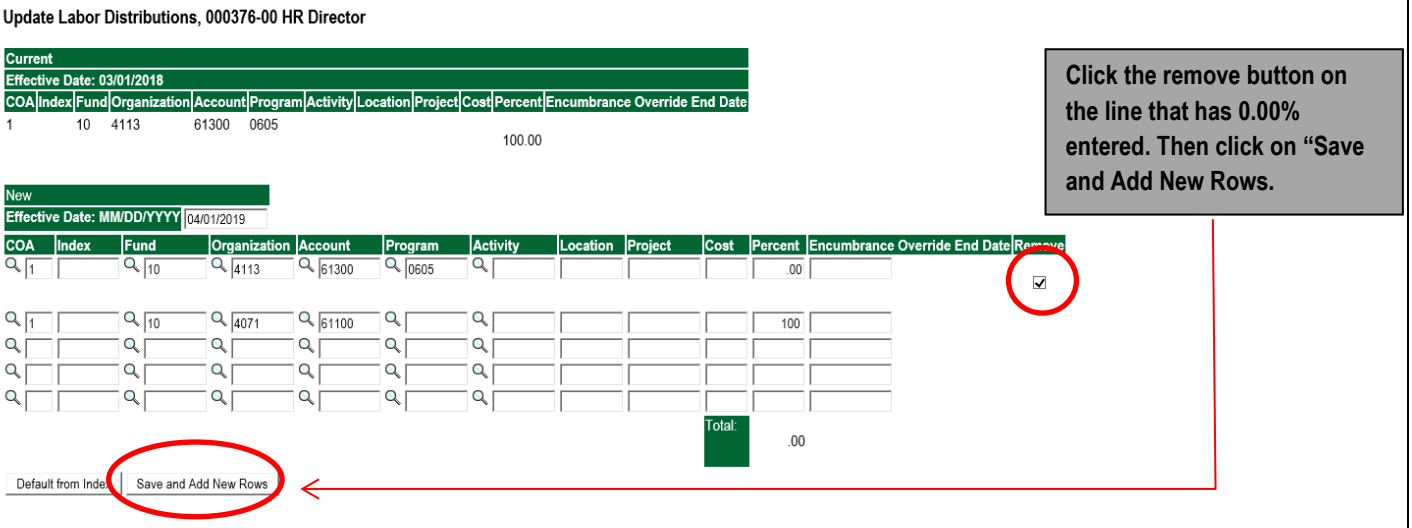
v. 61500 = Technical
vi. 61600 = Skilled Craft
vii. 61700 = Service Maintenance

e. Percentage = totals must equal 100%. See sample below

Click to “Save and Add New Rows”



- Click on the box under the “Remove” Column to remove the old accounting information. The percentage should be set 0.00%.
- Click on Save and Add New Rows. The old accounting information should be removed.



Update Labor Distributions, 000376-00 HR Director

Current
Effective Date: 03/01/2018

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	4113	61300	0605					100.00	

New
Effective Date: MM/DD/YYYY 04/01/2019

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		10	4071	61100	0507					100.00		☐
									Total:	100.00		

Default from Index | Save and Add New Rows

10. Routing Queue

Academic Affairs

a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
b. For Academic Termination from DSU, **all EPAFs must have a Chair and Dean level approval.**
c. For Academic (Grants) Termination from DSU, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office,** Other approval levels will default.
d. **EXAMPLE ROUTING QUEUE:**
    i. Chair
    ii. Dean
    iii. Academic Affairs = Cheryl Ballard (CBALLARD)
    iv. Provost = Dr. Charles McAdams (CMCADAMS)
    v. HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
    vi. Budget = Tonia Walker (TAWALKER)
    vii. Payroll FYI = Charlotte Litton (CLITTON)
    viii. HR2 = Rachel Becker (RBECKER)
    ix. HR Director = Lisa Giger (LGIGER)
    x. Super = Charlotte Litton (CLITTON)

Non Academic Affairs:

a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
b. **All EPAFs must have a Director and Vice President level approval.**
c. Grants Termination from DSU, **all EPAFS must have a Director, Vice President, Grants, and Grants Budget Office,** This can be added to bottom of the queue. Other approval levels will default.
d. **EXAMPLE ROUTING QUEUE:**
    i. Dept (Director/Supervisor)
    ii. Vice President
    iii. HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
    iv. Budget = Tonia Walker (TAWALKER)
    v. Payroll FYI = Charlotte Litton (CLITTON)
    vi. HR2 = Rachel Becker (RBECKER)
    vii. HR Director = Lisa Giger (LGIGER)
    viii. Super = Charlotte Litton (CLITTON)

11. Click on the **"Save and Add New Rows".**

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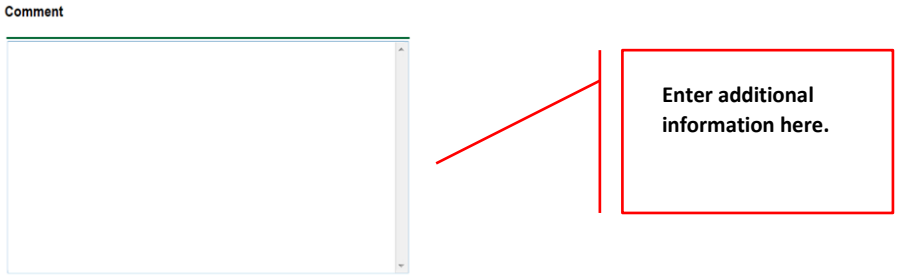
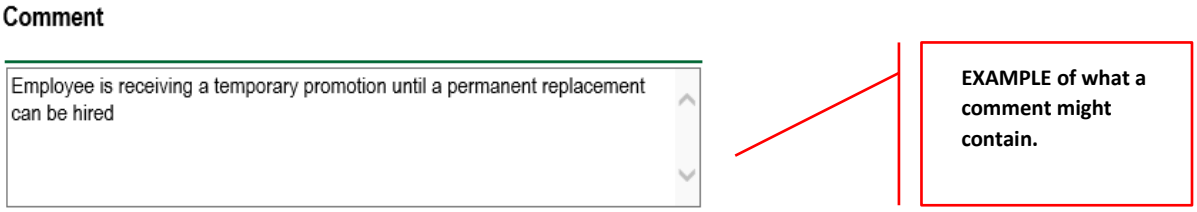
12. **Comments**
    - In the "Comments" section, enter comments for the approvers with an explanation for the action.





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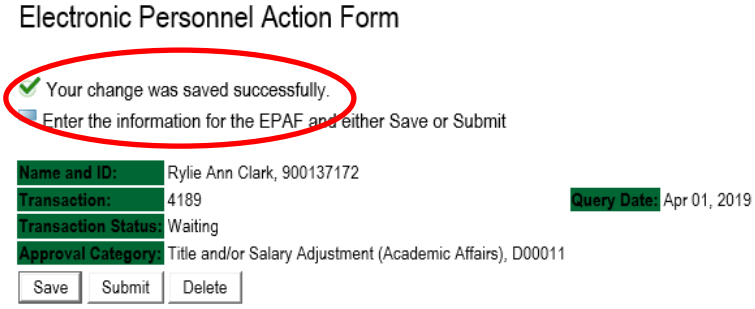
13. **Save EPAF**
    - Hit the "Save" Button at the bottom of the form.
    - Return to the top of the form.
    - The message should display – **"Your change was saved successfully."**
    - Check your date entry



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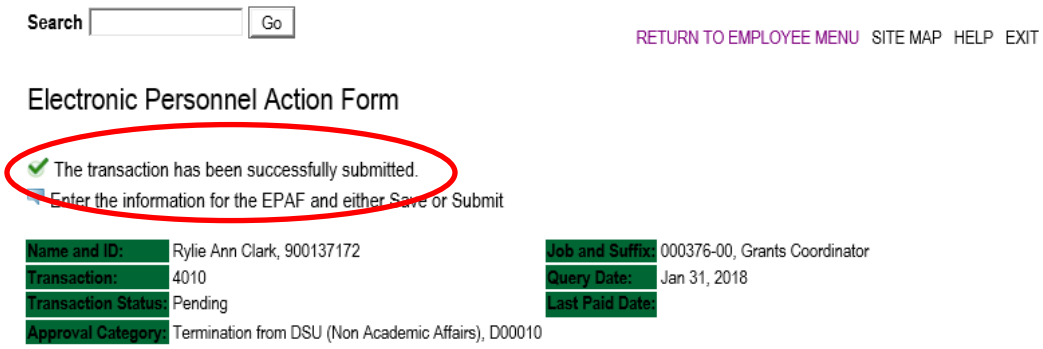
14. **Submit EPAF**
    - Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
    - The EPAF automatically routes to the approvers in the order of their approval levels.



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Delete

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

HOURLY TITLE AND/OR RATE ADJUSTMENT FOR EMPLOYEE
Accessing the EPAF Menu & Approver Summary

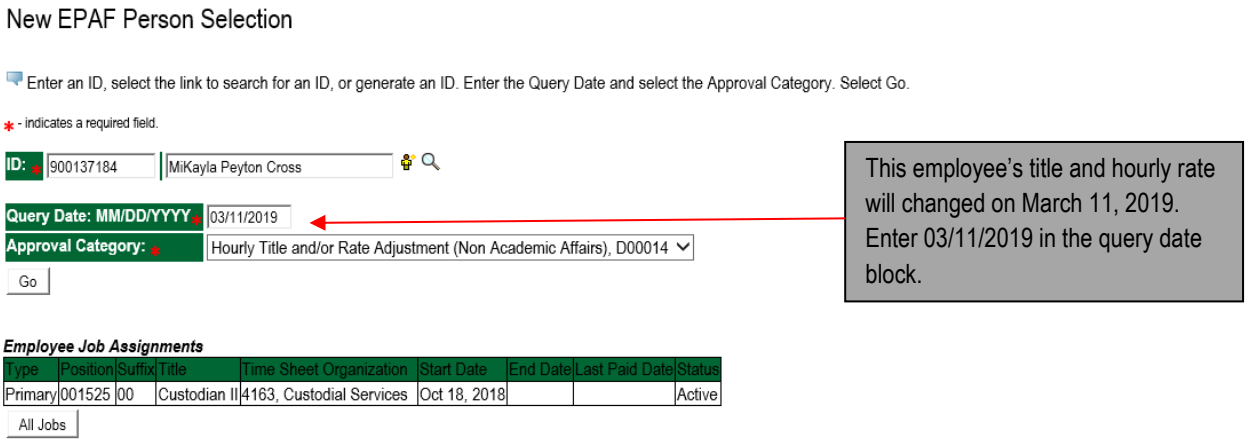
Log into Employee Self Service and choose **ELECTRONIC PERSONNEL ACTION FORMS** and then **NEW EPAF.**

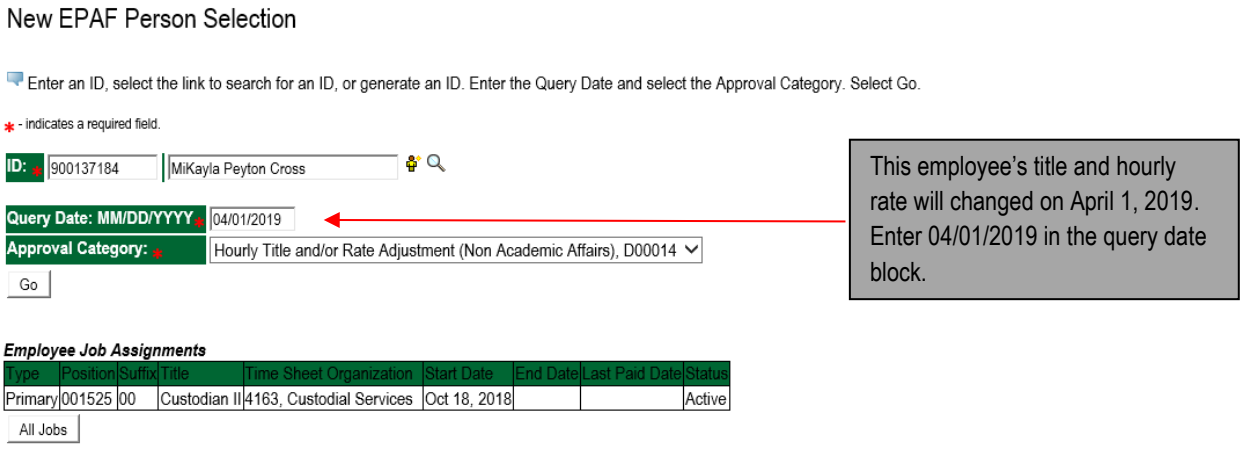
This EPAF should only be used to change the title and/or salary of a salaried employee's **PRIMARY** job or additional job duties currently set-up in Banner. It cannot be used if the employee is transferring to another position on campus.

This should not be used to temporarily increase an employee's salary. You should use One Time Payment – Extra Services (Non Academic Affairs) – D00007 or One Time Payment – Extra Services (Academic Affairs) – D00008.

The steps below should be followed:

1. Enter the employee's 900# or click on the magnifying glass to search for an employee's 900#.
2. The query date will default to today's date. Change the query date to the effective date of the title and/or hourly rate change. For example:
    - If the change is to take place on any day of the month, then use the date the change will take place. If the change is to take place on the 1st day of the month, then use the first day of the month. See examples below.





3. Select **Hourly Title and/or Rate Adjustment (Academic Affairs) {D00013} or Hourly Title and/or Rate Adjustment (Non Academic Affairs) {D00014}** from the drop down approval category box.

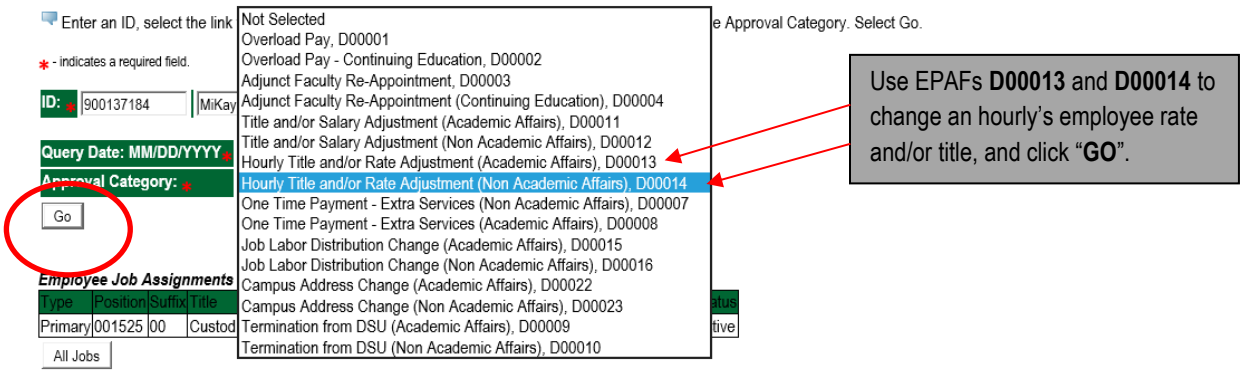
Academic Affairs = *departments that report to the Provost*. This EPAF is used for changes to faculty/staff positions in departments/divisions that report directly to the provost.

Non Academic Affairs = *any departments that do not report to the Provost*, but report to other Vice Presidents/Directors. This EPAF is used for changes to positions in departments that do not report to the Provost.

CHANGES TO TITLE AND/OR HOURLY RATE MUST HAVE SUPPORTING DOCUMENTATION AND FORWARDED TO OFFICE OF HUMAN RESOURCES.

SALARIED EMPLOYEES' TITLE AND/OR RATE ADJUSTMENTS ARE COMPLETED ON EPAFs D00011 AND D00012.

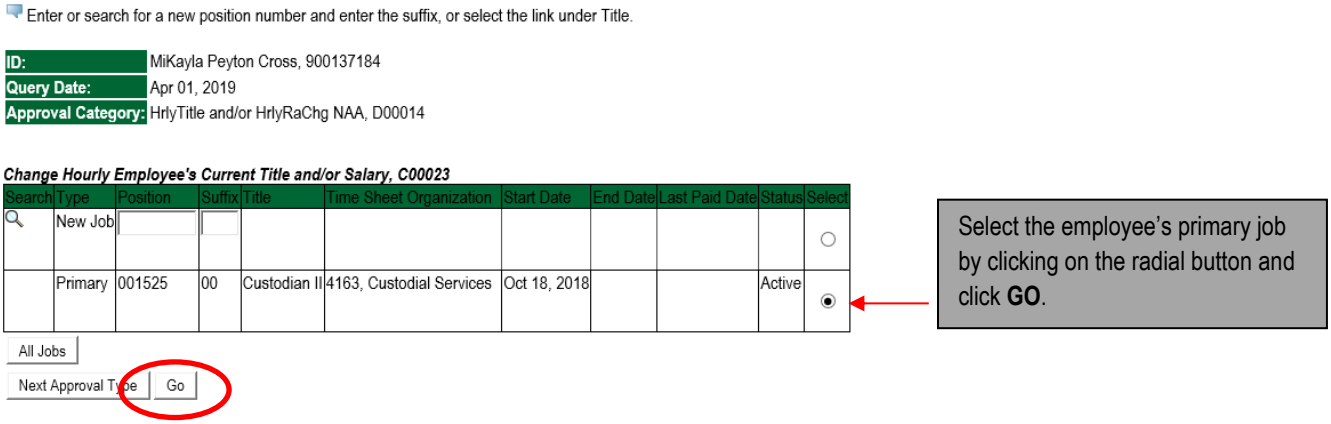
New EPAF Person Selection



4. Click the radial button at the end of the row for the **PRIMARY JOB** and click **GO.** A new job should not be entered using this EPAF.

5. Click on **GO** to begin processing the EPAF.

New EPAF Job Selection



6. Change the **Employee Class Code** only if an employee is changing to either part-time or full-time status. See codes below.

Employee Code	Description
H1	Hourly part-time or full-time employees, with benefits
H2	Hourly part-time employees, no benefits

Hourly Employee Class

Item	Current Value	New Value
Employee Class Code:	H1, Hourly Eligible for Benefits	H1
Employee Status: (Not Enterable)	Active	A
FT/PT Status:	Full Time	Part Time

EXAMPLE 1:
Hourly employee is changing from 40 hours per week to 25 hours per week and will still receive benefits:

- enter code **H1** in the **Employee Class Code**
- change **FT/PT Status** to **Part Time**

Hourly Employee Class

Item	Current Value	New Value
Employee Class Code:	H2, Hourly Ineligible for Benefits	H1
Employee Status: (Not Enterable)	Active	A
FT/PT Status:	Part Time	Full Time

EXAMPLE 2:
Hourly employee is changing from working 19 hours per week to 40 hours per week and will now receive benefits.

- enter code **H1** in the **Employee Class Code**
- change **FT/PT Status** to **Full Time**

Hourly Employee Class

Item	Current Value	New Value
Employee Class Code:	H1, Hourly Eligible for Benefits	
Employee Status: (Not Enterable)	Active	A
FT/PT Status:	Full Time	Not Selected

EXAMPLE 3:
Employee Class is not changing. Employee is currently working 40 hours week and will continue to do so.

- **Employee Class Code** – no entry
- **FT/PT Status** to **Full Time** – no entry

---

7. Change hourly employee's current title and/or salary.

a. **JOB BEGIN DATE:** No entry – leave blank

b. **JOB EFFECTIVE DATE:** Enter the effective date of the hourly rate and/or title change.

c. **PERSONNEL DATE:** Enter the effective date of the hourly rate and/or title change.

d. **JOB STATUS:** No entry – leave blank

e. **TITLE:** Enter employee's new title, if applicable. If title is not changing, leave blank.

f. **FTE:** Enter "1" if the FTE is not changing and employee is working 40 hours per week. If employee is working less than 40 hours per week, enter the new FTE. To figure new FTE, divide hours worked per week by 40.

For example: Employee will change from working 40 hours per week to working 25 hours per week. To figure new FTE, divide 25 by 40 = .63 (25 / 40). Enter .63 in the FTE field.

g. **JOB CHANGE REASON:** Select the reason for change using the drop down menu. (i.e. Title change – TITLE, receiving a promotion – PROMO, salary increase raise – RAISE, etc.)

h. **REGULAR RATE:** Enter employee's new hourly rate, if applicable. If hourly rate is not changing, leave blank.

EMPLOYEE'S TITLE AND HOURLY RATE CHANGE

Hourly Employee Class

Item	Current Value	New Value
Employee Class Code:	H1, Hourly Eligible for Benefits	
Employee Status: (Not Enterable)	Active	A
FT/PT Status:	Full Time	Not Selected

Change Hourly Employee's Current Title and/or Salary, 001525-00 Custodian II

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	10/18/2018	
Jobs Effective Date: MM/DD/YYYY*	10/18/2018	
Personnel Date: MM/DD/YYYY*	10/18/2018	
Job Status: (Not Enterable)	Active	A
Title:	Custodian II	
FTE:	1	1
Job Change Reason:		Not Selected
Regular Rate:	10	

EXAMPLE 1: Title and Hourly Rate Change

Hourly Employee Class

Item	Current Value	New Value
Employee Class Code:	H1, Hourly Eligible for Benefits	
Employee Status: (Not Enterable)	Active	A
FT/PT Status:	Full Time	Not Selected

Change Hourly Employee's Current Title and/or Salary, 001525-00 Custodian II

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	10/18/2018	
Jobs Effective Date: MM/DD/YYYY*	10/18/2018	03/11/2019
Personnel Date: MM/DD/YYYY*	10/18/2018	03/11/2019
Job Status: (Not Enterable)	Active	A
Title:	Custodian II	Lead Custodian
FTE:	1	1
Job Change Reason:		PROMO, Promotion
Regular Rate:	10	15.00

An employee's title and hourly is changing on March 11, 2019, from Custodian II to Lead Custodian. Hourly rate is changing from $10.00/hr. to $15.00/hr. Employee is considered full-time, 40 hours per week.

The EPAF will be entered using the following information:

Employee Class Code: no entry. Employment status is not changing.

Job Begin Date: No entry
Job Effective Date: 03/11/2019
Job Personnel Date: 03/11/2019
Job Status: No entry
Title: Lead Custodians
FTE: 1.00
Job Change Reason: Promo (enter reason for change using the drop down menu.)
Hourly Rate: $15.00

SEE EXAMPLE 1 at left.

EXAMPLE 2: Title, Hourly Rate, & Hours Worked Change

Hourly Employee Class

Item	Current Value	New Value
Employee Class Code:	H1, Hourly Eligible for Benefits	H1
Employee Status: (Not Enterable)	Active	A
FT/PT Status:	Full Time	Part Time

Change Hourly Employee's Current Title and/or Salary, 001525-00 Lead Custodian

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	10/18/2018	
Jobs Effective Date: MM/DD/YYYY*	04/01/2019	04/01/2019
Personnel Date: MM/DD/YYYY*	04/01/2019	04/01/2019
Job Status: (Not Enterable)	Active	A
Title:	Lead Custodian	Custodian Supervisor
FTE:	1	0.63
Job Change Reason:	PROMO	PROMO, Promotion
Regular Rate:	15	17.00

An employee's title and hourly rate is changing on April 1, 2019, from Lead Custodian to Custodian Supervisor. Hourly rate is changing from $15.00/hr. to $17.00/hr. Employee is changing from full-time to part-time working 25 hours per week.

The EPAF will be entered using the following information:

EMPLOYEE CLASS CODE: H1
FT/PT Status: Part-time

Job Begin Date: No entry
Job Effective Date: 04/01/2019
Job Personnel Date: 04/01/2019
Job Status: No entry
Title: Custodian Supervisor
FTE: .63 (25hrs / 40hrs)
Job Change Reason: Promo (enter reason for change using the drop down menu)
Hourly Rate: $17.00

SEE EXAMPLE 2 AT LEFT.

TITLE CHANGE ONLY: Complete the following fields:

- Job Effective Date
- Personnel Date
- Title
- FTE:
- Job Change Reason (Title, Promo)

Change Hourly Employee's Current Title and/or Salary, 001525-00 Custodian II

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	10/18/2018	
Jobs Effective Date: MM/DD/YYYY*	10/18/2018	04/01/2019
Personnel Date: MM/DD/YYYY*	10/18/2018	04/01/2016
Job Status: (Not Enterable)	Active	A
Title:	Custodian II	Interim Lead Custodian
FTE:	1	1.00
Job Change Reason:		PROMO, Promotion
Regular Rate:	10	

HOURLY RATE CHANGE ONLY: Complete the following fields

- Employee Class Code (if applicable)
- Job Effective Date
- Personnel Date
- FTE (if applicable)
- Job Change Reason (Promo, Raise, COLA)
- Regular Rate

Change Hourly Employee's Current Title and/or Salary, 001525-00 Custodian II

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	10/18/2018	
Jobs Effective Date: MM/DD/YYYY*	10/18/2018	04/01/2019
Personnel Date: MM/DD/YYYY*	10/18/2018	04/01/2016
Job Status: (Not Enterable)	Active	A
Title:	Custodian II	
FTE:	1	1.00
Job Change Reason:		COLA, Cost of Living Adjustment
Regular Rate:	10	10.58

IF AN EMPLOYEE IS LEAVING THE UNIVERSITY, USE THE FOLLOWING EPAFS:

- **TERMINATION FROM DSU (ACADEMIC AFFAIRS) [D00009]**
- **TERMINATION FROM DSU (NON ACADEMIC AFFAIRS) [D00010].**

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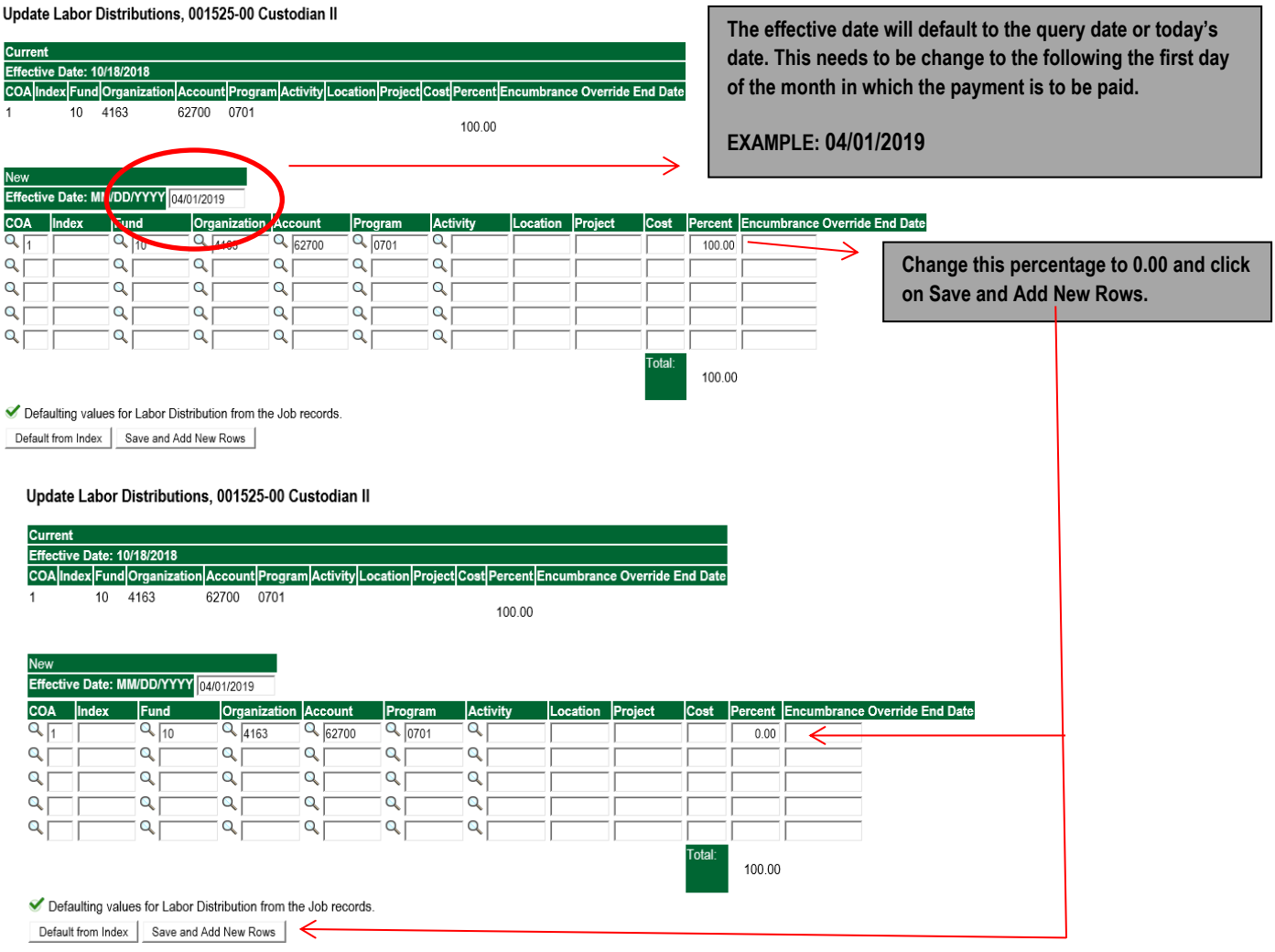
8. UPDATE LABOR DISTRIBUTION – If Needed

a. In the "CURRENT" section – the current labor codes and the effective date of the last change will default into the form.
b. In the "NEW" section – add new rows or make changes to the existing rows.
c. EFFECTIVE DATE: The effective date is the first day of the month in which the payment will be made: MM/01/20__
EXAMPLE: 04/01/2019
d. Apply the appropriate changes to the field if necessary.

Steps to change Labor Distributions

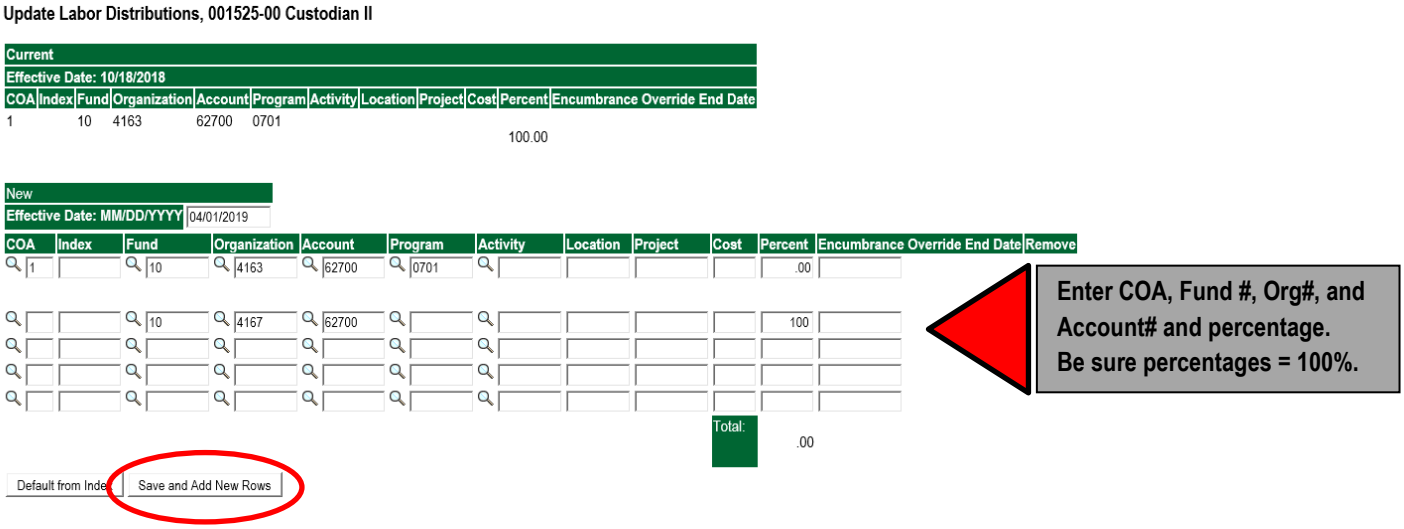
To remove the default payment information, change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.



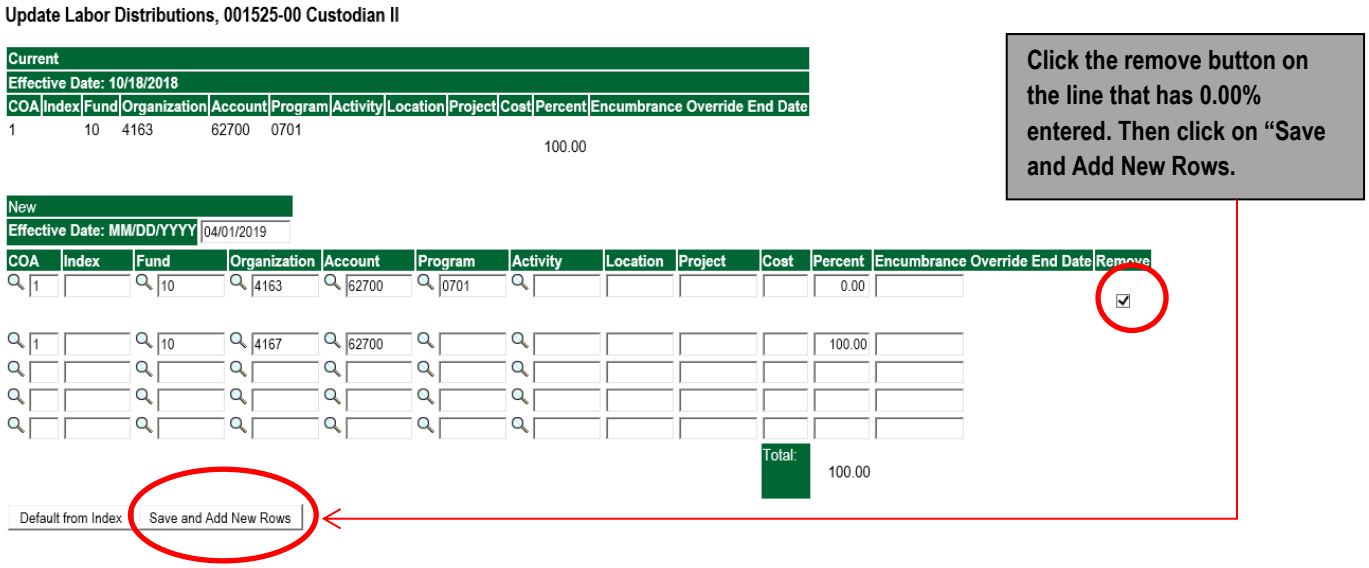
9. Enter the new accounting information. The following must be entered for each line.

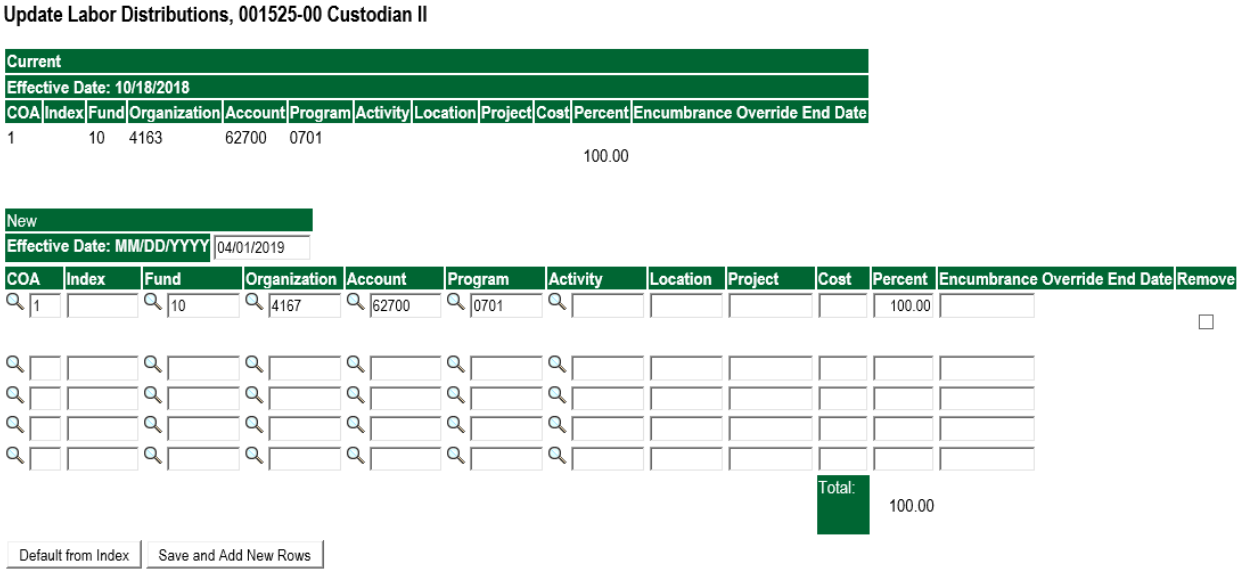
a. COA = enter 1.
b. Fund No.
c. Organization No.
d. Account No. =
   i. 62100 = Administrative
   ii. 62300 = Paraprofessional
   iii. 62400 = Secretarial/Clerical
   iv. 62500 = Technical
   v. 62600 = Skilled Craft
   vi. 62700 = Service Maintenance
e. Percentage = totals must equal 100%. See sample below

Click to "Save and Add New Rows"



10. Click on the box under the "Remove" Column to remove the old accounting information. The percentage should be set 0.00%.
11. Click on Save and Add New Rows. The old accounting information should be removed.





12. Routing Queue

Academic Affairs

a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
b. For Academic Termination from DSU, **all EPAFs must have a Chair and Dean level approval.**
c. For Academic (Grants) Termination from DSU, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office,** Other approval levels will default.
d. **EXAMPLE ROUTING QUEUE:**
    i. Chair
    ii. Dean
    iii. Academic Affairs = Cheryl Ballard (CBALLARD)
    iv. Provost = Dr. Charles McAdams (CMCADAMS)
    v. HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
    vi. Budget = Tonia Walker (TAWALKER)
    vii. Payroll FYI = Charlotte Litton (CLITTON)
    viii. HR2 = Rebecca Bouse (RBOUSE)
    ix. HR Director = Lisa Giger (LGIGER)
    x. Super = Charlotte Litton (CLITTON)

Non Academic Affairs:

a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
b. **All EPAFs must have a Director and Vice President level approval.**
c. Grants Termination from DSU, **all EPAFS must have a Director, Vice President, Grants, and Grants Budget Office,** This can be added to bottom of the queue. Other approval levels will default.
d. **EXAMPLE ROUTING QUEUE:**
    i. Dept (Director/Supervisor)
    ii. Vice President
    iii. HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
    iv. Budget = Tonia Walker (TAWALKER)
    v. Payroll FYI = Charlotte Litton (CLITTON)
    vi. HR2 = Rebecca Bouse (RBOUSE)
    vii. HR Director = Lisa Giger (LGIGER)
    viii. Super = Charlotte Litton (CLITTON)

13. Click on the **"Save and Add New Rows".**

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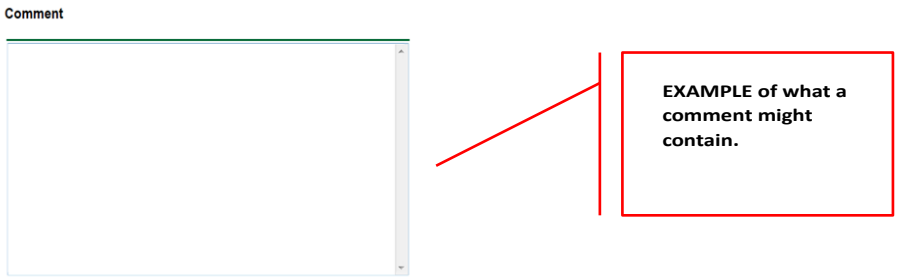
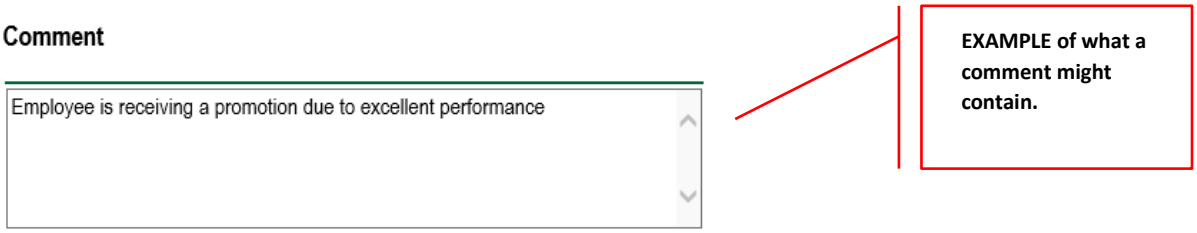
14. **Comments**
    - In the "Comments" section, enter comments for the approvers with an explanation for the action.





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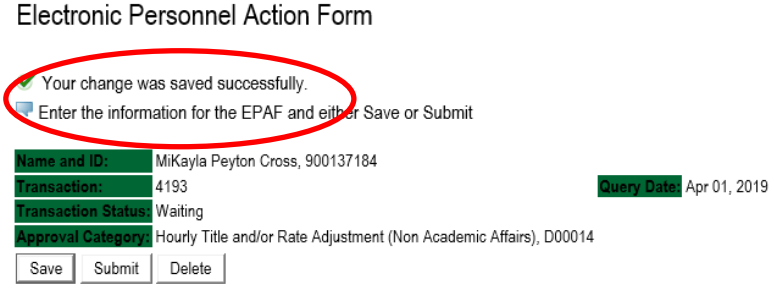
15. **Save EPAF**
    - Hit the "Save" Button at the bottom of the form.
    - Return to the top of the form.
    - The message should display – **"Your change was saved successfully."**
    - Check your date entry



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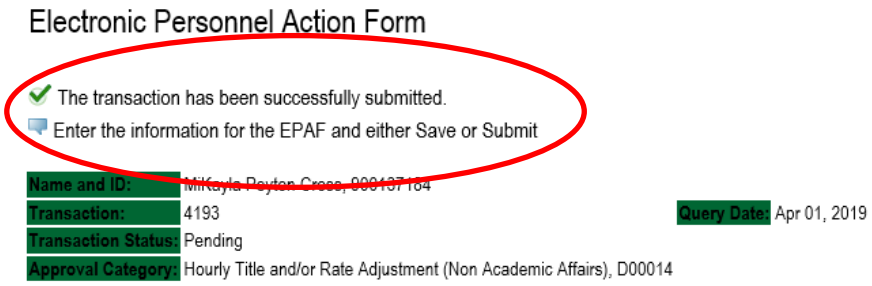
16. **Submit EPAF**

- Hit the “Submit” button. If errors occur, fix the errors, Save and Re-Submit.
- The EPAF automatically routes to the approvers in the order of their approval levels.



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Delete

If an EPAF needs to be re-started, click on the “Delete” button. This will delete the transaction and allow you to start over.

UPDATE LABOR DISTRIBUTIONS
Accessing the EPAF Menu & Approver Summary

Log into Employee Self Service and choose **ELECTRONIC PERSONNEL ACTION FORMS** and then **NEW EPAF.**

This EPAF should be used to change the labor distributions for a position which is already entered in the system. This will mainly apply to employees working on grants where the grant fund number changes annually, or for positions where the source of funding has changed. The steps below should be followed:

10. Enter the employee's 900# or click on the magnifying glass to search for an employee's 900#.
11. The query date will default to today's date. Change the query date to the effective date of the change. For faculty/staff paid monthly, this will usually be the first day of the month in which the change takes effect; for hourly employees on bi-weekly payroll, this will usually be the first day of the next bi-weekly pay period. For some grants, however, this will be another date.

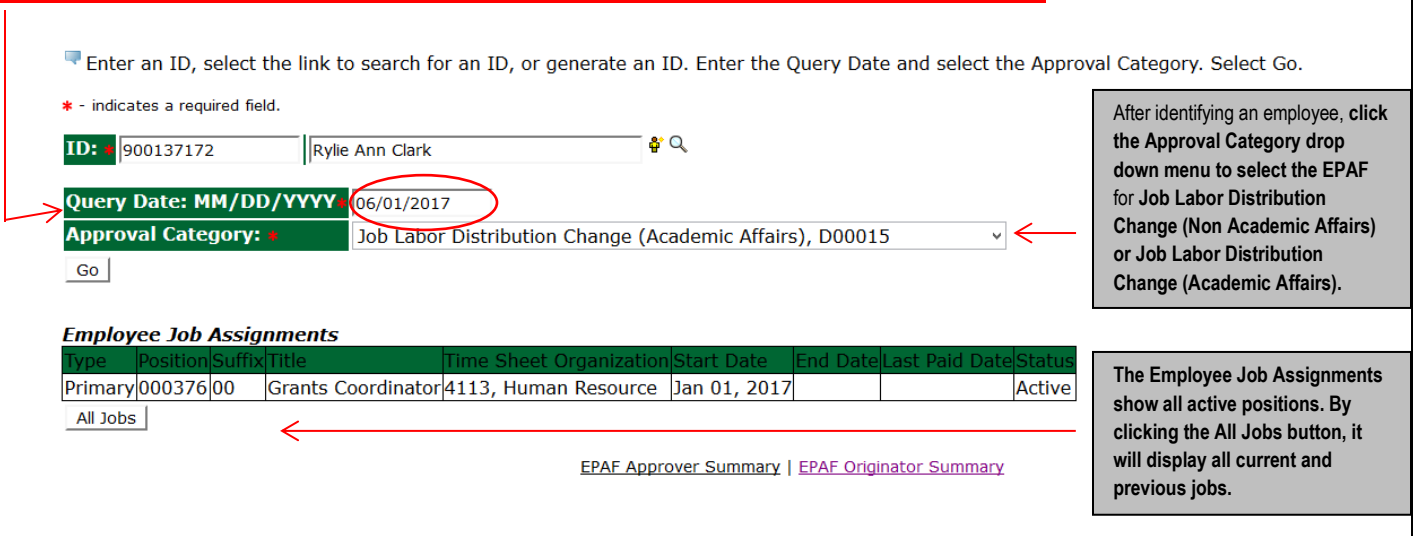
    EXAMPLE: 09/01/2017 (Monthly) OR 06/16/2017 (BW13) OR 09/29/2017 (Grant start date)
12. Select **Job Labor Distribution Change (Non Academic Affairs) or Job Labor Distribution Change (Academic Affairs)** from the drop down approval category box.

    Non Academic Affairs = *any departments that do not report to the Provost*, but report to other Vice Presidents/Directors. This EPAF is used for changes to positions in departments that do not report to the Provost.

    Academic Affairs = *departments that report to the Provost*. This EPAF is used for changes to faculty/staff positions in departments/divisions that report directly to the provost.

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DAY YOU WANT THE CHANGE TO TAKE PLACE. IF IT IS NOT SET TO THE CORRECT DATE, IT WILL CAUSE AN ERROR AND YOU WILL HAVE TO RESTART THE EPAF.



After identifying an employee, **click the Approval Category drop down menu to select the EPAF** for **Job Labor Distribution Change (Non Academic Affairs) or Job Labor Distribution Change (Academic Affairs).**

The Employee Job Assignments show all active positions. By clicking the All Jobs button, it will display all current and previous jobs.

Enter or search for a new position number and enter the suffix, or select the link under Title.

ID:	Rylie Ann Clark, 900137172
Query Date:	Jun 01, 2017
Approval Category:	Update Labor Dist NAA, D00016

Update Labor Distributions, C00010

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									◉
	Primary	000376	00	Grants Coordinator	4113, Human Resource	Jan 01, 2017			Active	○

All Jobs

Go

4. Click on "Go" to begin the Job Labor Distribution Change (Non Academic Affairs) or Job Labor Distribution Change (Academic Affairs)
5. In the "CURRENT" section – the current labor codes and the effective date of the last change will default into the form.
6. In the "NEW" section – add new rows or make changes to the existing rows.
7. EFFECTIVE DATE: The effective date is the first day of the month in which the payment will be made: MM/01/20__
   EXAMPLE: 06/01/2017

Update Labor Distributions, 000376-00 Grants Coordinator

Current

Effective Date: 01/01/2017

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override Er
1		10	4113	61300	0605					100.00	

New

Effective Date: MM/DD/YYYY 06/01/2017

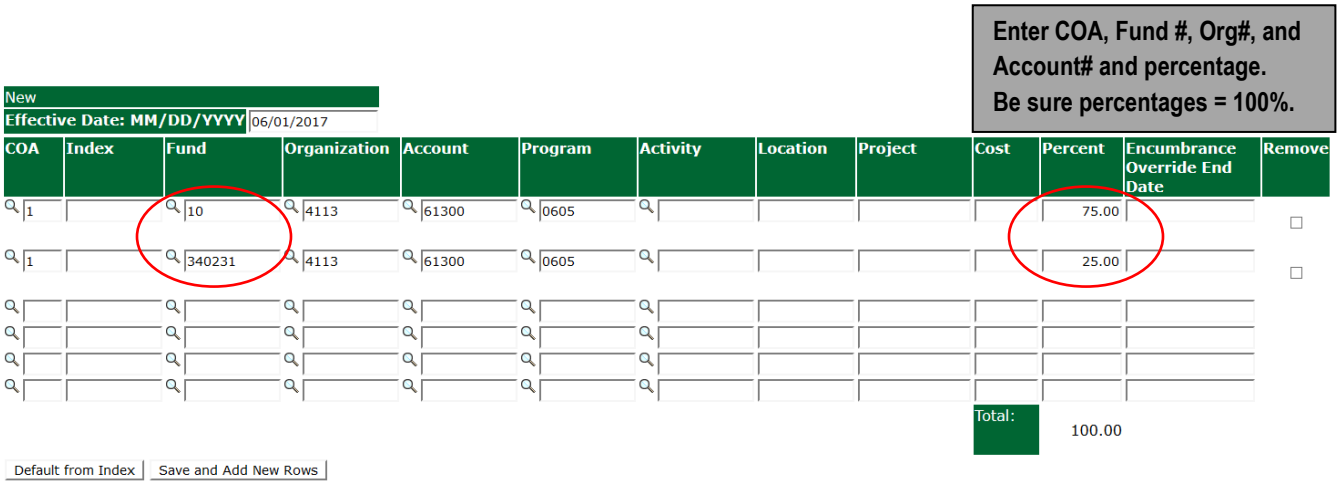
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	4113	61300	0605					100.00	
									Total:	100.00	

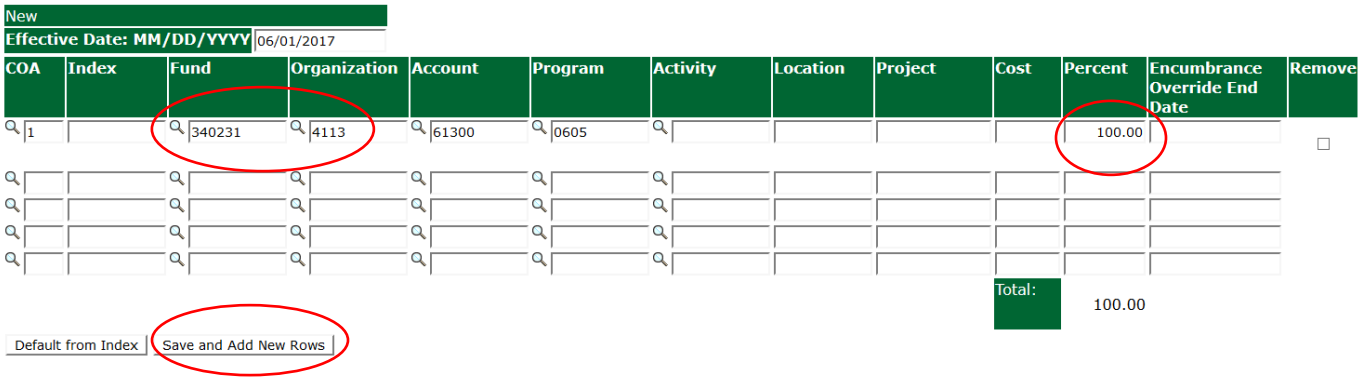
The effective date will default to the query date or today's date. This needs to be change to the following the first day of the month in which the payment is to be paid.
EXAMPLE: 02/01/2018

✔ Defaulting values for Labor Distribution from the Job records.

Default from Index | Save and Add New Rows

8. Under "New" make any necessary changes to the Fund, Organization, or Account
   a. COA = enter 1.
   b. Fund No.
      i. General university budget funds, Fund 10
      ii. Other funds (not grants) – The fund numbers usually start with "108" (ex. 108221)
      iii. Grants – The fund numbers usually start with "3" (ex. 340231)
   c. Organization No.
   d. Account No. =
      i. 61100 = Administrative
      ii. 61200 = Faculty
      iii. 61300 = Paraprofessional
      iv. 61400 = Secretarial/Clerical
      v. 61500 = Technical
      vi. 61600 = Skilled Craft
      vii. 61700 = Service Maintenance
   e. Percentage = totals must equal 100%. See sample below





9. Click "Save and Add New Rows"

13. Routing Queue

Non Academic Affairs:

a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.

b. **All EPAFs must have a Director and Vice President level approval.**

c. Grants One-Time Payment – Extra Services, **all EPAFS must have a Director, Vice President, Grants, and Grants Budget Office**. This can be added to bottom of the queue. Other approval levels will default.

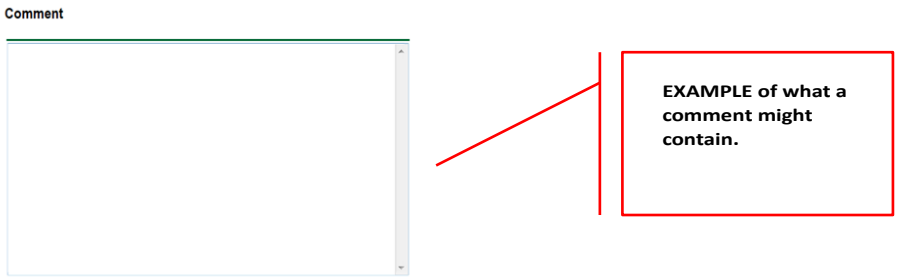
d. **EXAMPLE ROUTING QUEUE:**

   i. Dept (Director/Supervisor)
   ii. Vice President
   iii. HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
   iv. Budget = Tonia Walker (TAWALKER)
   v. Payroll = Charlotte Litton (CLITTON)
   vi. HR Director = Lisa Giger (LGIGER)
   vii. Super = Charlotte Litton (CLITTON)

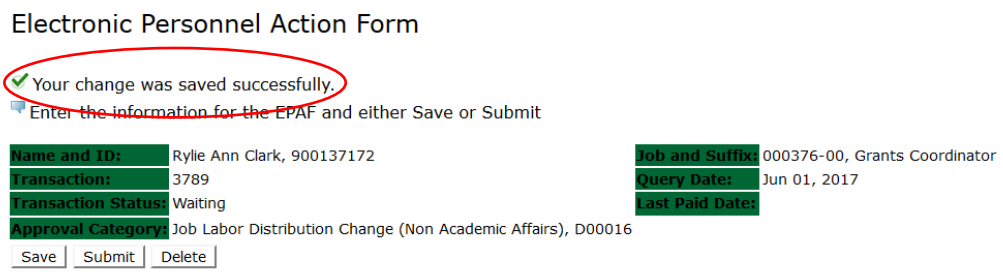
Academic Affairs

e. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
f. For Academic One-Time Payment – Extra Services, **all EPAFs must have a Chair and Dean level approval.**
g. For Academic Grants One-Time Payment – Extra Services, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office**. Other approval levels will default.
h. For Academic One-Time Payment – Extra Services Continuing Education, add **Dean, Graduate and Continuing Education and Continuing Education (Marilyn Read).** This can be added to the bottom of the queue.
i. **EXAMPLE ROUTING QUEUE:**
    i. Chair
    ii. Dean
    iii. Academic Affairs = Cheryl Ballard (CBALLARD)
    iv. Provost = Dr. Charles McAdams (CMCADAMS)
    v. HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
    vi. Budget = Tonia Walker (TAWALKER)
    vii. Payroll = Charlotte Litton (CLITTON)
    viii. HR Director = Lisa Giger (LGIGER)
    ix. Super = Charlotte Litton (CLITTON)

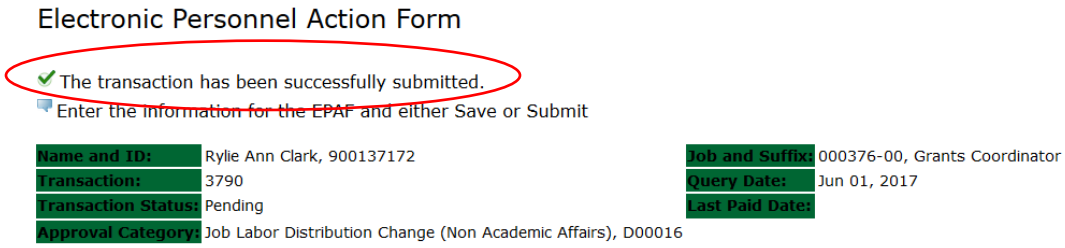
15. Click on the **"Save and Add New Rows".**
16. **Comments**
    - In the "Comments" section, enter comments for the approvers with an explanation for the action.



16. **Save EPAF**
    - Hit the "Save" Button at the bottom of the form.
    - Return to the top of the form.
    - The message should display – **"Your change was saved successfully."**
    - Check your date entry



17. **Submit EPAF**
    - Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
    - The EPAF automatically routes to the approvers in the order of their approval levels.



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Delete

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

CAMPUS ADDRESS CHANGES
Accessing the EPAF Menu & Approver Summary

Log into Employee Self Service and choose **ELECTRONIC PERSONNEL ACTION FORMS** and then **NEW EPAF.**

This EPAF should be used to change an employee's campus address. The steps below should be followed:

1. Enter the employee's 900# or click on the magnifying glass to search for an employee's 900#.
2. The query date will default to today's date. Change the query date to the effective date of the change.
   EXAMPLE: 02/01/2018 OR 02/16/2018 OR 07/09/2018
3. Select **Campus Address Change (Non Academic Affairs) or Campus Address Change (Academic Affairs)** from the drop down approval category box.

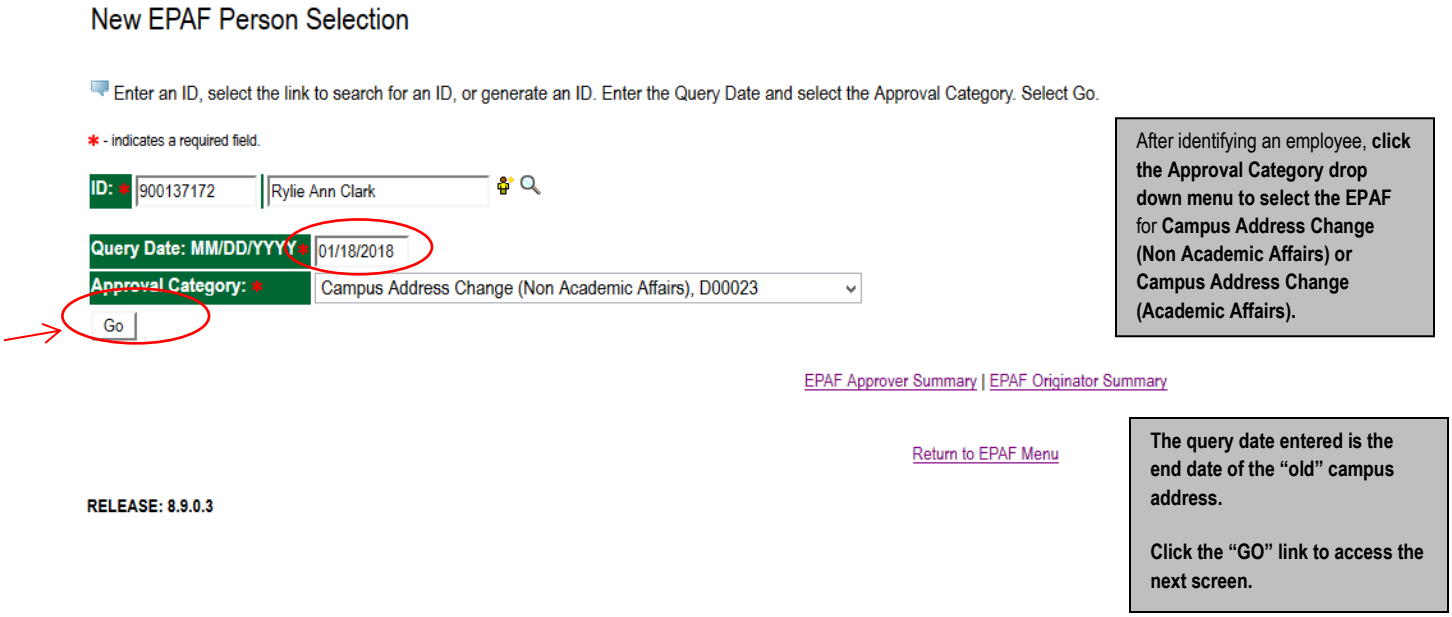
   Non Academic Affairs = *any departments that do not report to the Provost*, but report to other Vice Presidents/Directors. This EPAF is used for changes to positions in departments that do not report to the Provost. **This EPAF is used for also for Academic Affairs staff positions.**

   Academic Affairs = *departments that report to the Provost*. This EPAF is used for campus address changes to **FACULTY** positions **ONLY** in departments/divisions that report directly to the provost.

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DAY YOU WANT TO END THE CURRENT CAMPUS ADDRESS.

For example, an employee is moving to another office location on January 19, 2018. The query date entered will be January 18, 2018, because the "old" campus address will end on January 18, 2018.

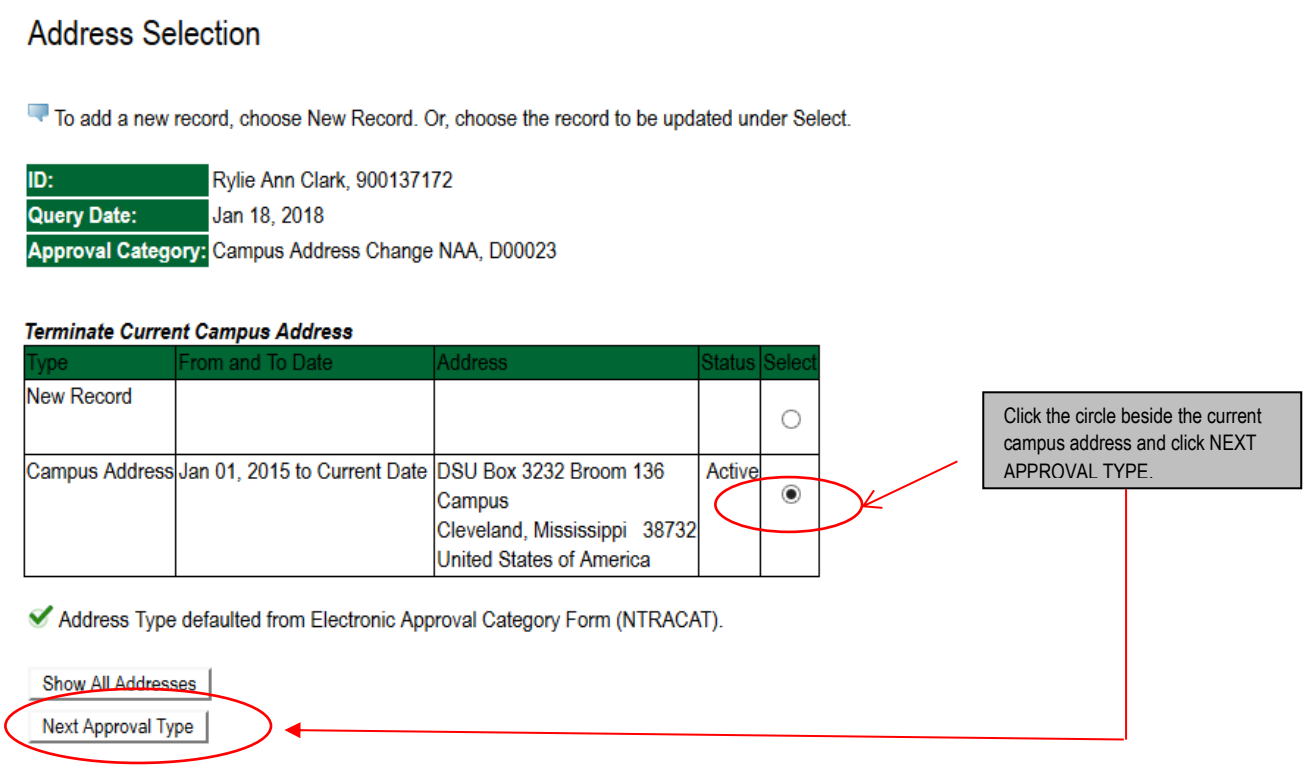


After identifying an employee, **click the Approval Category drop down menu to select the EPAF** for **Campus Address Change (Non Academic Affairs) or Campus Address Change (Academic Affairs).**

The query date entered is the end date of the "old" campus address.

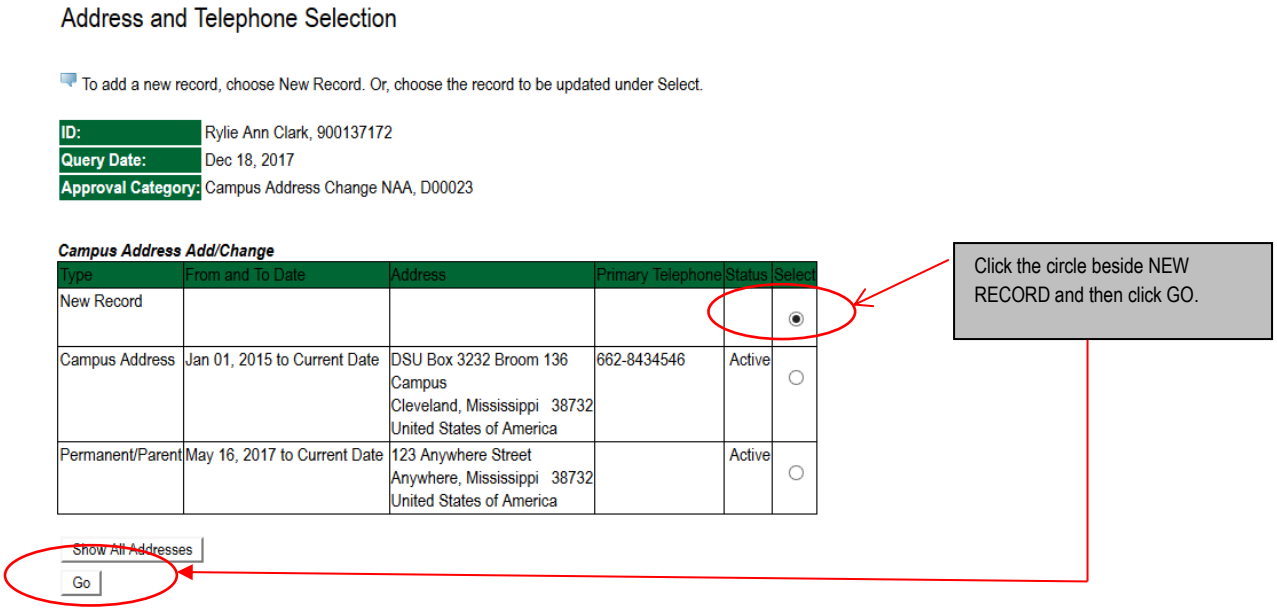
Click the "GO" link to access the next screen.

4. Below is the screen to terminate the current or "old" campus address. The query date entered on the previous screen is the date the campus address will end.
5. Check the circle beside the current campus address and click **NEXT APPROVAL TYPE.**



6. On the next screen, click on the circle to enter the new campus address.

PERMANENT ADDRESS CHANGES ARE NOT TO MADE THROUGH EPAFs. ONLY HUMAN RESOURCES IS AUTHORIZED TO MAKE A PERMANENT ADDRESS CHANGE.

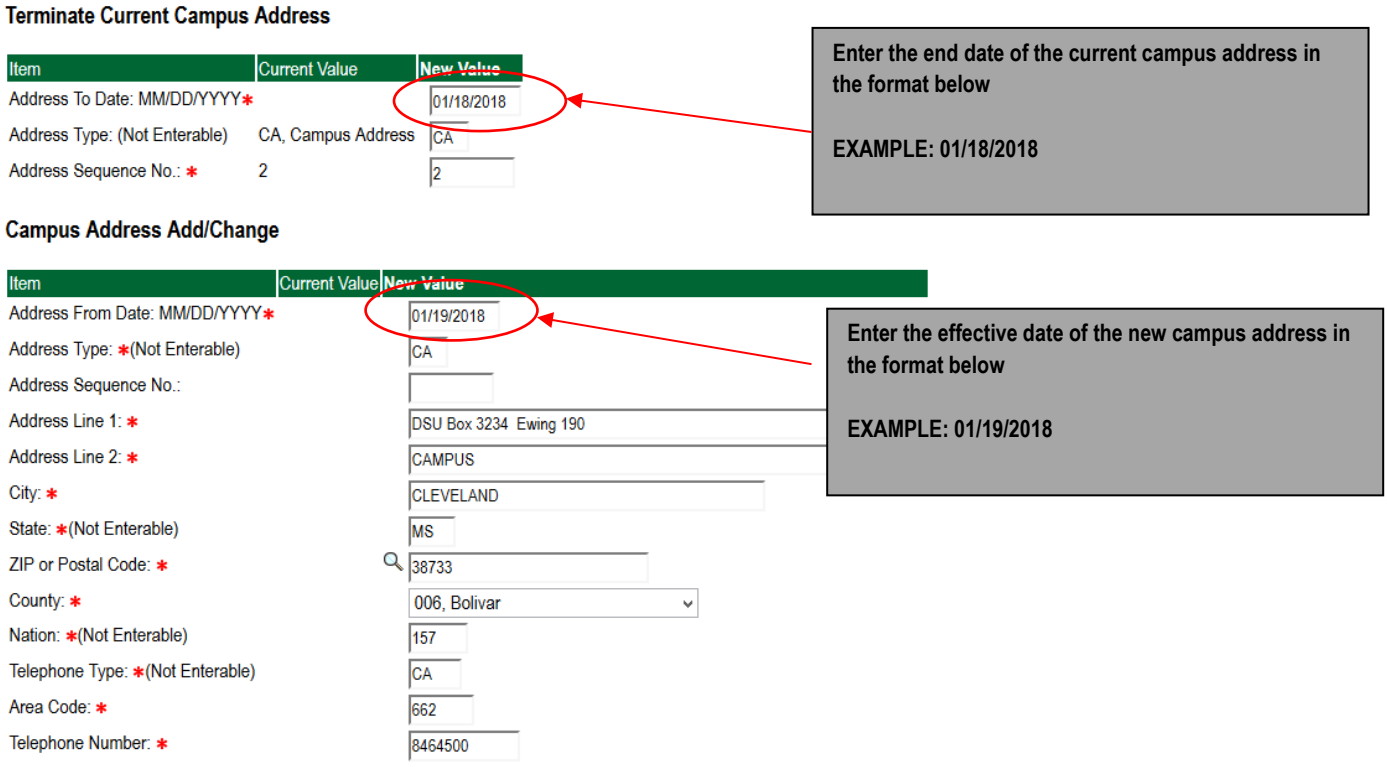


7. Under the section heading, **TERMINATE CURRENT CAMPUS ADDRESS**, enter the date to end the current or "old" campus address.
    - Under the section heading, **CAMPUS ADDRESS ADD/CHANGE,** enter the effective date of the new campus address in the **ADDRESS FROM DATE** field.
    - Address Type: CA will default and cannot be change
    - Address Sequence No.: Leave Blank
    - Address Line 1: Enter the new campus address in this format. Do not abbreviate the campus addresses.
        - **EXAMPLE: DSU Box 3234 Ewing 190**

          Or if no DSU Box

          Kent Wyatt Hall 247
    - Address Line 2: CAMPUS will default, no entry needed
    - City: CLEVELAND will default, no entry needed
    - State: MS will default, no entry needed
    - Zip: 38733 will default, no entry needed
    - County: 006 will default, no entry needed
    - Nation: 157 will default, no entry needed
    - Telephone Type: CA will default, no entry needed
    - Area Code: 662 will default, no entry needed
    - Telephone Number: Enter the telephone number beginning with the prefix 846. A hypen is not needed
        - **EXAMPLE: 8464500**

PLEASE SEE EXAMPLE BELOW.



8. Routing Queue

Non Academic Affairs:

In the "Routing Queue" section, Human Resources has been defaulted in for all staff campus address changes. No changes are needed

Routing Queue

Approval Level	User Name		Required Action
90 - (HR) Human Resources	LGIGER	Lisa Weeks Giger	Approve
99 - (SUPER) Superuser	LGIGER	Lisa Weeks Giger	Apply
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected

Save and Add New Rows

Academic Affairs

j. In the "Routing Queue" section, Academic Affairs and Human Resources has been defaulted in for all faculty campus address changes. No changes are needed.

Routing Queue

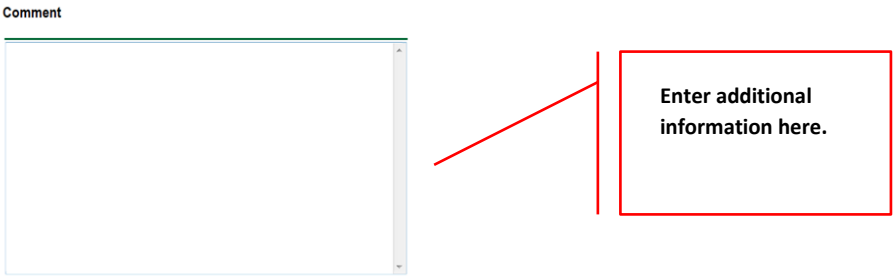
Approval Level	User Name		Required Action
40 - (ACDAFF) Academic Affairs	CBALLARD	Cheryl M Ballard	Approve
90 - (HR) Human Resources	LGIGER	Lisa Weeks Giger	Approve
99 - (SUPER) Superuser	LGIGER	Lisa Weeks Giger	Apply
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected

Save and Add New Rows

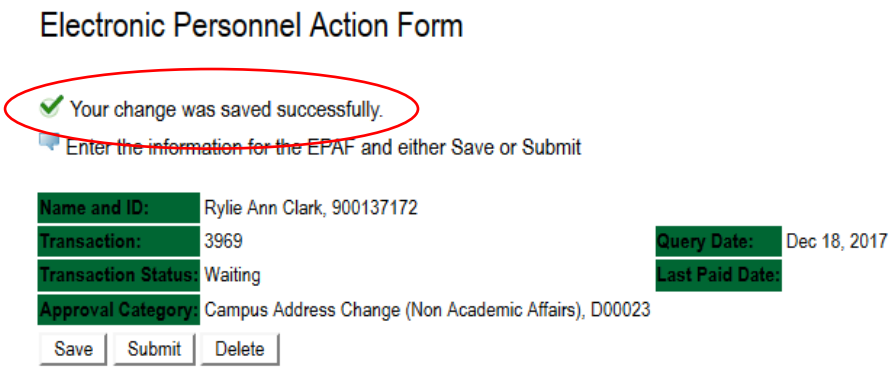
9. Click on the **"Save and Add New Rows".**

10. Comments

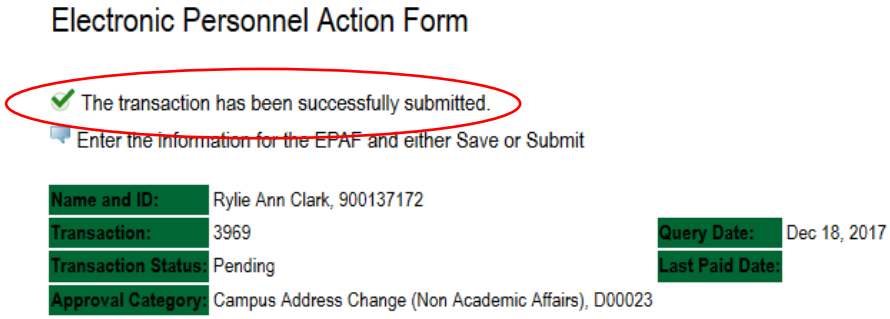
- In the "Comments" section, enter comments for the approvers with an explanation for the action.
- In the "Comments" section, enter comments for the approvers with an explanation for the action.



11. **Save EPAF**
    - Hit the "Save" Button at the bottom of the form.
    - Return to the top of the form.
    - The message should display – **"Your change was saved successfully."**
    - Check your date entry



12. **Submit EPAF**
    a. Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
    b. The EPAF automatically routes to the approvers in the order of their approval levels.



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Delete

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

EPAF APPROVER
Accessing the EPAF Menu & Approver Summary

To approve an EPAF you first must log into Employee Self Services.

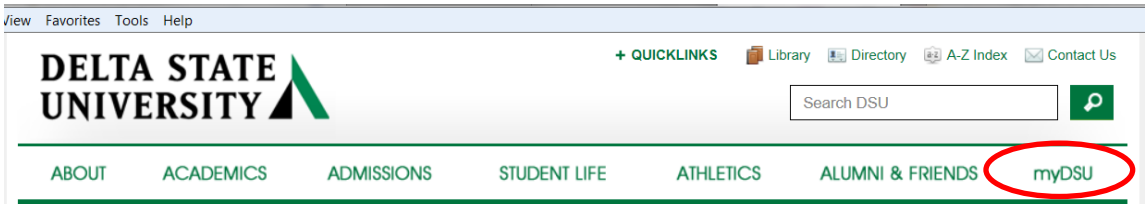
Accessing EPAF menu in DSU Online Services

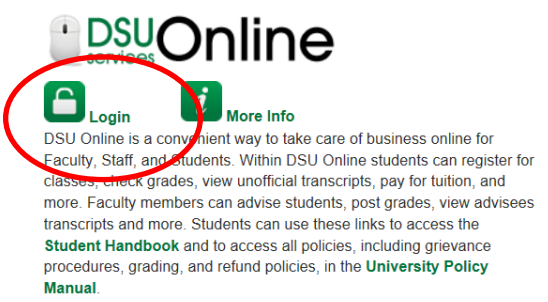
To access the EPAF menu, you must have authorization to initiate and/or approve in DSU Online Services. Once you have the appropriate authorizations, you will need to log on to DSU Online Services.

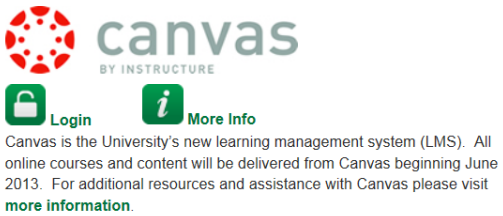
Accessing Employee Self Service through DSU Online Services

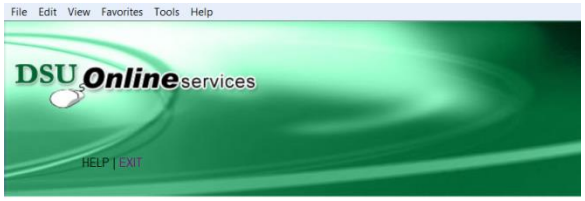
Employee Self Service can be accessed through the DSU website:

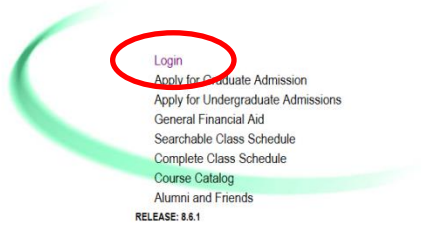
1. Open your internet browser on your computer.
2. Click on myDSU.
3. Click on Login under DSU online services.
4. Click on Login again to gain access to Employee Self Services.



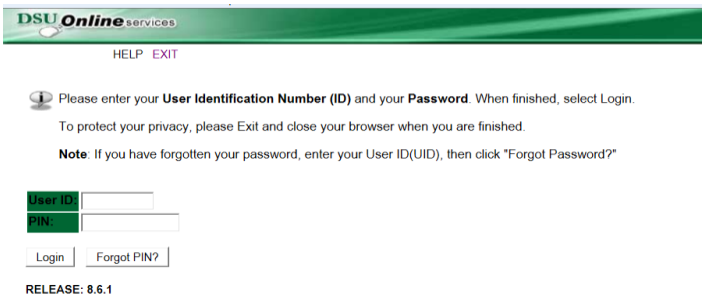




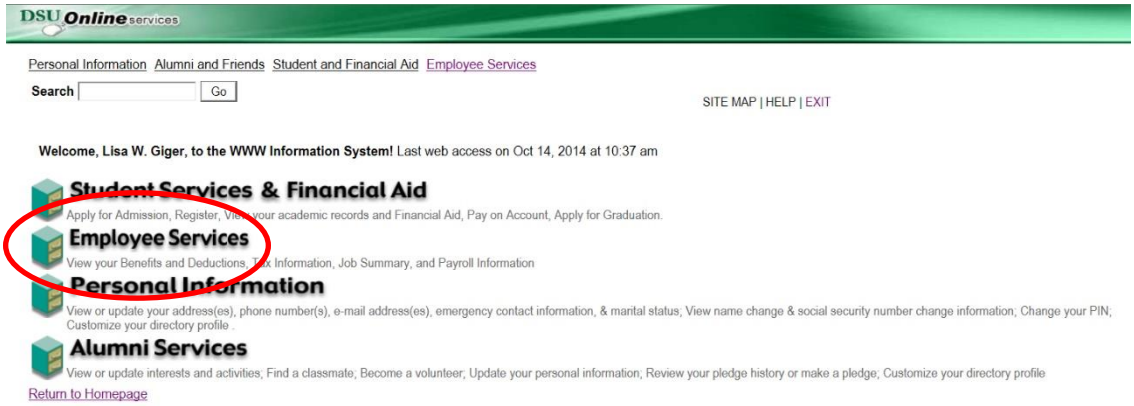




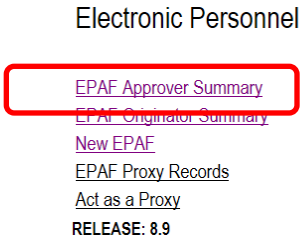
5. Enter your 900# and password.



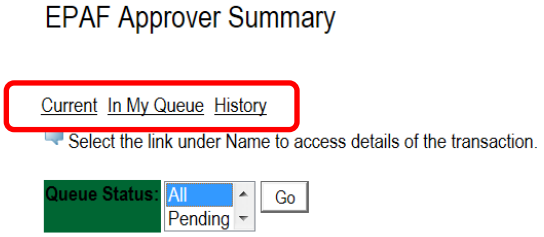
6. Click on Employee Services.



To approve an EPAF you first go and review the EPAF Approval Summary link. Once at the EPAF menu click on the EPAF Approver Summary link.



The EPAF Approver Summary page has three sections: Current, In My Queue, and History Tabs. The "Current Tab" contains EPAFs that either needs to be approved or acknowledged by the Approver. The **"In My Queue"** Tab contains EPAFs that will be routed to the Approver in the future. The **"History Tab"** contains EPAFs that an Approver has previously processed.



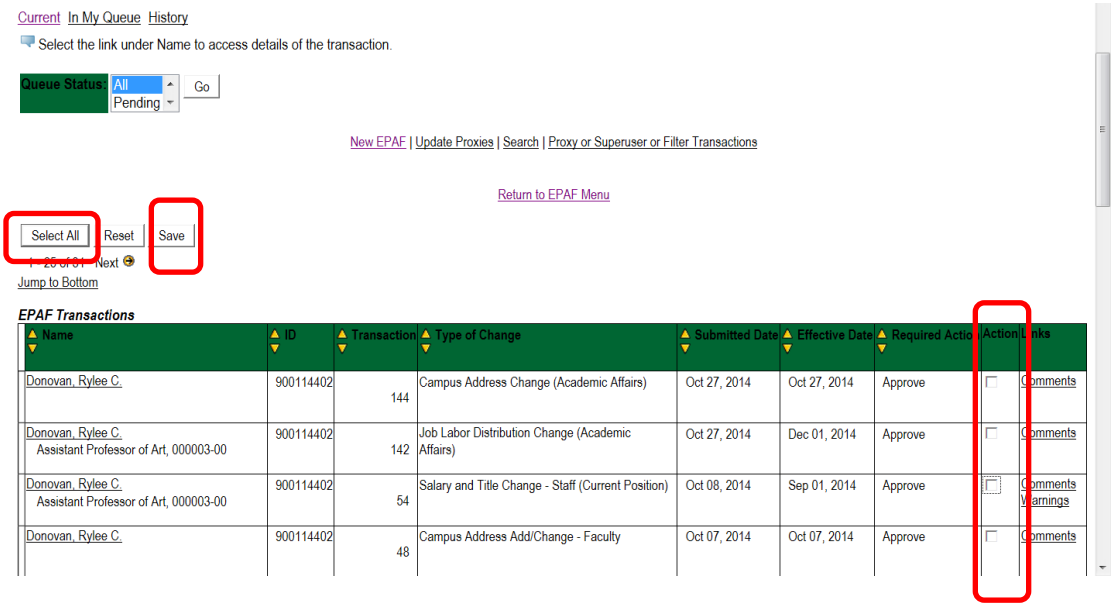
The Current Link:

Displays transactions that with the following statuses:

- **Pending** - Transaction is pending approval.
- **FYI** - Transaction is pending acknowledgement.
- **More Information** - Transaction is pending approval but an approver is requesting additional information before they approve it.

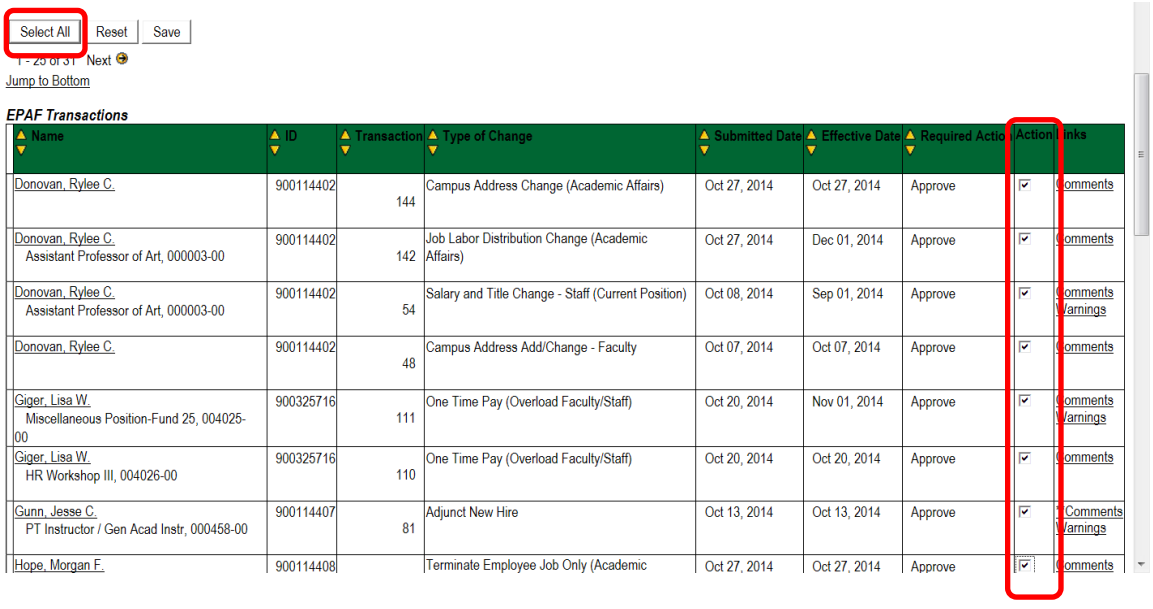
To enter the EPAF for any transaction, click on the person's name.

On the "Current Tab" of the EPAF Approver Summary, notice the action column. It has an enterable box that when you click on the box it makes that record selected for approving. In order to approve the EPAF simply click on the save button. **To select all of the transaction press the select all button.**



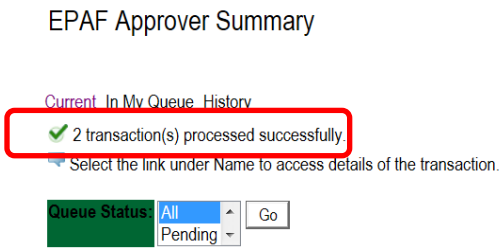
Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Actio	Action	Links
Donovan, Rylee C.	900114402	144	Campus Address Change (Academic Affairs)	Oct 27, 2014	Oct 27, 2014	Approve		Comments
Donovan, Rylee C. Assistant Professor of Art, 000003-00	900114402	142	Job Labor Distribution Change (Academic Affairs)	Oct 27, 2014	Dec 01, 2014	Approve		Comments
Donovan, Rylee C. Assistant Professor of Art, 000003-00	900114402	54	Salary and Title Change - Staff (Current Position)	Oct 08, 2014	Sep 01, 2014	Approve		Comments Warnings
Donovan, Rylee C.	900114402	48	Campus Address Add/Change - Faculty	Oct 07, 2014	Oct 07, 2014	Approve		Comments

The screenshot below illustrates having **selected all** of the transaction for approval.



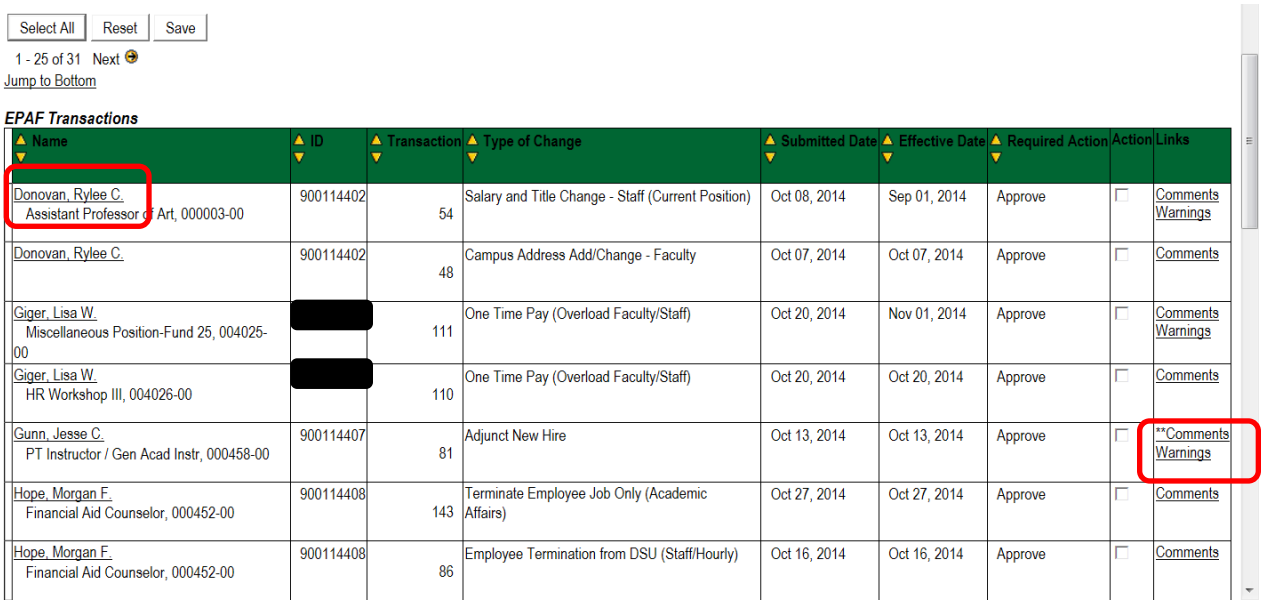
Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Actio	Action	Links
Donovan, Rylee C.	900114402	144	Campus Address Change (Academic Affairs)	Oct 27, 2014	Oct 27, 2014	Approve	☑	Comments
Donovan, Rylee C. Assistant Professor of Art, 000003-00	900114402	142	Job Labor Distribution Change (Academic Affairs)	Oct 27, 2014	Dec 01, 2014	Approve	☑	Comments
Donovan, Rylee C. Assistant Professor of Art, 000003-00	900114402	54	Salary and Title Change - Staff (Current Position)	Oct 08, 2014	Sep 01, 2014	Approve	☑	Comments Warnings
Donovan, Rylee C.	900114402	48	Campus Address Add/Change - Faculty	Oct 07, 2014	Oct 07, 2014	Approve	☑	Comments
Giger, Lisa W. Miscellaneous Position-Fund 25, 004025-00	900325716	111	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Nov 01, 2014	Approve	☑	Comments Warnings
Giger, Lisa W. HR Workshop III, 004026-00	900325716	110	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Oct 20, 2014	Approve	☑	Comments
Gunn, Jesse C. PT Instructor / Gen Acad Instr, 000458-00	900114407	81	Adjunct New Hire	Oct 13, 2014	Oct 13, 2014	Approve	☑	Comments Warnings
Hope, Morgan F.	900114408		Terminate Employee Job Only (Academic	Oct 27, 2014	Oct 27, 2014	Approve	☑	Comments

Once you save the EPAF you should receive a message indicating that the amount of transactions that were approved. Please make sure that it states that they are processed successfully.



Reviewing Your Work before Approving:

For the purpose of reviewing the detail associated with any of the EPAF, you may click on the name of the individual. The employee's name is underlined in black and indicates that it is a link into the detail information. Notice that is the same as the Comments. **Please don't forget to review them especially if there are two asterisks before the word comment (**Comments)**.



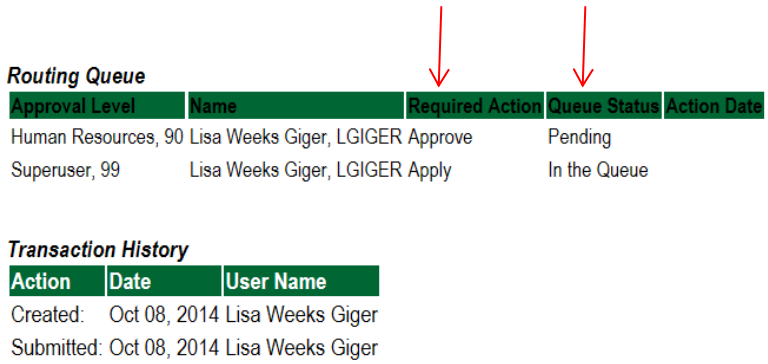
Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Donovan, Rylee C. Assistant Professor of Art, 000003-00	900114402	54	Salary and Title Change - Staff (Current Position)	Oct 08, 2014	Sep 01, 2014	Approve	☐	Comments Warnings
Donovan, Rylee C.	900114402	48	Campus Address Add/Change - Faculty	Oct 07, 2014	Oct 07, 2014	Approve	☐	Comments
Giger, Lisa W. Miscellaneous Position-Fund 25, 004025-00	[redacted]	111	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Nov 01, 2014	Approve	☐	Comments Warnings
Giger, Lisa W. HR Workshop III, 004026-00	[redacted]	110	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Oct 20, 2014	Approve	☐	Comments
Gunn, Jesse C. PT Instructor / Gen Acad Instr, 000458-00	900114407	81	Adjunct New Hire	Oct 13, 2014	Oct 13, 2014	Approve	☐	**Comments Warnings
Hope, Morgan F. Financial Aid Counselor, 000452-00	900114408	143	Terminate Employee Job Only (Academic Affairs)	Oct 27, 2014	Oct 27, 2014	Approve	☐	Comments
Hope, Morgan F. Financial Aid Counselor, 000452-00	900114408	86	Employee Termination from DSU (Staff/Hourly)	Oct 16, 2014	Oct 16, 2014	Approve	☐	Comments

Once you click on the name link you will see the following:
The Approver has the capability of doing the following for EPAFs that are pending approval:

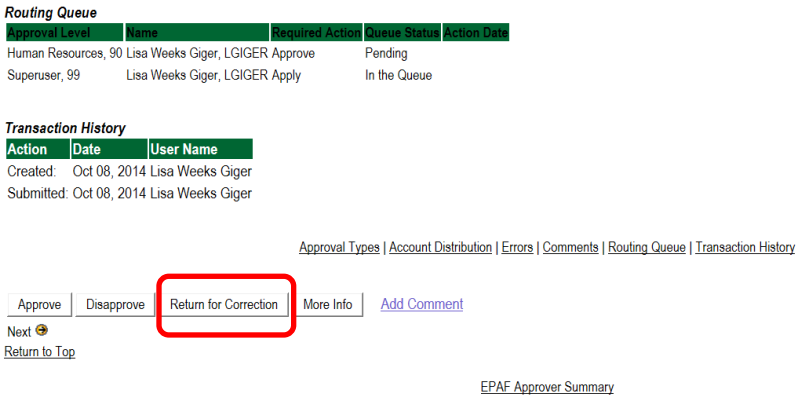
- Approve – To approve a transaction.
- Disapprove - To disapprove a transaction.
- Return For Correction – To return a transaction to the Originator to make changes. Any transaction that has been returned should have a comment that indicates why it was returned.
- More Info – To request additional information from the Originator without returning the transaction for correction. If an approver requires more information about a transaction, they should enter a comment that indicates what additional information is needed.
- Add Comment – To add a comment to the transaction.

Transactions with comments will display as **Comments in the Links section on the EPAF Approver Summary Page.

Here you can see the routing information used to route this EPAF and what action is still pending to be completed. You can see the comments entered by the originator and who the originator is.



When you Return for Correction, the transaction is removed from your current queue but you can see it in your history tab.



In My Queue Link

Displays transactions that with the following statuses:

- In the Queue – Transaction is in the queue of the approver but has not reached the approver's approval level yet.

To enter the EPAF to review the information for any transaction, click on the person's name. The screen shot below shows the current value and the new value. The **new value** column is the column that needs approving.

Salary and Title Change/Current Position - Staff, 000003-00 Assistant Professor of Art

Enter Changes	Current Value	New Value
Jobs Effective Date: *	08/15/2013	09/01/2014
Personnel Date: *	08/15/2013	09/01/2014
Title:	Assistant Professor of Art	Associate Professor of Art
Annual Salary:	75000	80000.00
FTE:	1	1.00
Job Change Reason:		PROMO

Current

Effective Date: 10/01/2014

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	3006	61200	0101					100.00	

New

Effective Date: 10/08/2014

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	3006	61200	0101					100.00	

The History Link

Here you can see all the transactions that were processed. The History Link displays transactions with the following statuses:

- **Approved** – Transaction that has been an approved by the approver.
- **Acknowledged Overridden** – Transaction that has been approved by a Super User.
- **Applied** – Transaction that has been applied to Banner.
- **Disapproved** – Transaction that has been disapproved by an approver in the approval queue.
- **Returned for Correction** – Transaction that has been returned for the correction to the Originator.
- **Void** – Transaction that has been voided.
- **Removed from Queue** – Transaction that has been removed from the queue of the approver.

To enter the EPAF to review the information for any transaction, click on the person's name.

Common EPAF Errors

Below contains a list of common errors received when processing EPAFs. This list of errors is not all encompassing. So, if you should come across an error not listed, please contact Human Resources to assist you with resolving the problem.

New EPAF Job Selection Page

- Invalid Position Error

  - **Cause** – Invalid position number entered.
  - **Solution** – Enter a valid position number. If position number is unknown, perform a position search and select the correct valid position number.

Electronic Personnel Action Form Page

- Missing Required Field

  - **Cause** – Did not enter a required field.
  - **Solution** – Enter the New Value in the field indicated in the error message.

Invalid Date Format

- **Cause** – Date is not in the correct MM/DD/YYYY format.
- **Solution** – Format the date in the MM/DD/YYYY format.

Invalid Value

- **Cause** – Non-numeric value entered into a numeric field.
- **Solution** – Enter a numeric value.

Primary Job

- **Cause** – Contract Type field is set to Primary and the employee already has a primary job.
- **Solution** – Change the Contract Type field to Secondary or Overload based on the instructions for the EPAF you are processes.

Missing User ID in Routing Queue

- **Cause** – User ID has not been entered for each Approval Level in the Routing Queue.
- **Solution** – Enter the User ID for the Approval Level where the Approver is missing in the Routing Queue section. Also, the Originator's Default Routing Queue needs to be updated.