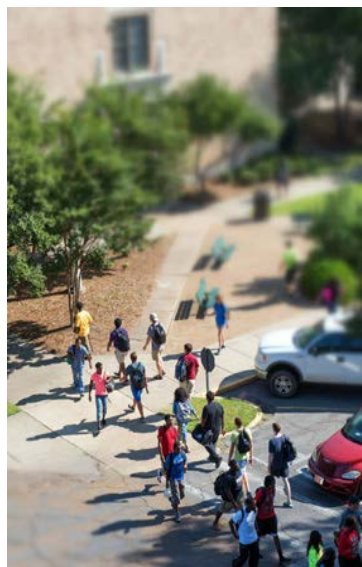


## ELECTRONIC ▪ PERSONNEL ▪ ACTION ▪ FORM (EPAF)

---

### Banner Human Resources Self Service User Manual



Release 1.3  
January 2021

## Table of Contents

Introduction:.....	4
 <b>Navigation, Approval Category and Routing Queues</b>	
EPAFs Originators:.....	5
How to Search for a Person: .....	7
Selecting the Applicable Approval Category .....	10
How to Enter a Routing Queue Manually .....	12
How to Create a Default Routing Queue.....	13
How to Review the Originators Transactions and Their Statuses .....	15
 <b>General:</b>	
Overload Pay and Overload Pay (Continuing Education – Non Credit) .....	17
Adjunct Rehire and Adjunct Rehire (Continuing Education – Non Credit) .....	26
Summer School Overload Pay .....	35
Summer School Overload Pay – Continuing Education .....	35
Summer School Overload Pay (Course Taught/Paid Over Both Sessions).....	35
Summer School Overload Pay – Continuing Education (Course Taught/Paid Over Both Sessions).....	35
Summer School Adjunct Re-Appointment.....	45
Summer School Adjunct Re-Appointment – Continuing Education.....	45
Summer School Adjunct Re-Appointment (Course Taught/Paid Over Both Sessions).....	45
Summer School Adjunct Re-Appointment – Continuing Education (Course Taught/Paid Over Both Sessions) .....	45
One-Time Payments – Extra Services (Non Academic Affairs) .....	54
One-Time Payments – Extra Services (Academic Affairs) .....	54
Termination/Resignation of Employee .....	65
Title and/or Salary Adjustment (Academic Affairs) .....	71
Title and/or Salary Adjustment (Non Academic Affairs) .....	71
Hourly Title and/or Rate Adjustment (Academic Affairs) .....	84
Hourly Title and/or Rate Adjustment (Non Academic Affairs) .....	84
Update Labor Distributions .....	94

Campus Address Change .....	99
-----------------------------	----

## **EPAF Approvers**

Accessing the EPAF Menu.....	104
------------------------------	-----

The EPAF Approver Summary.....	105
--------------------------------	-----

The Current Link.....	106
-----------------------	-----

Reviewing Your Work before Approving .....	107
--	-----

The “In MY Queue” Link .....	109
------------------------------	-----

The History Link .....	109
------------------------	-----

COMMON EPAF ERRORS.....	110
-------------------------	-----

## 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.

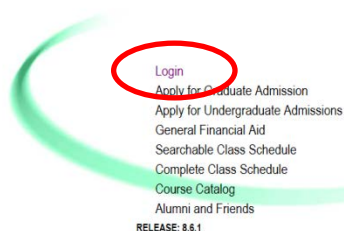
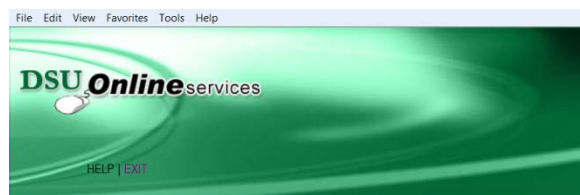
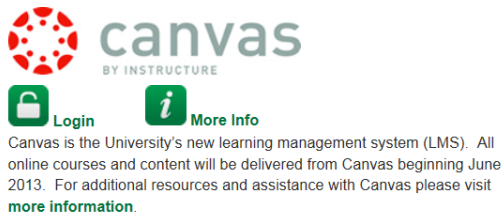
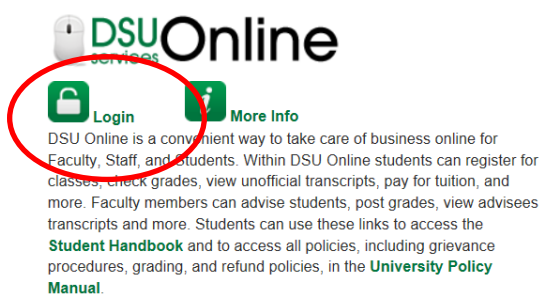
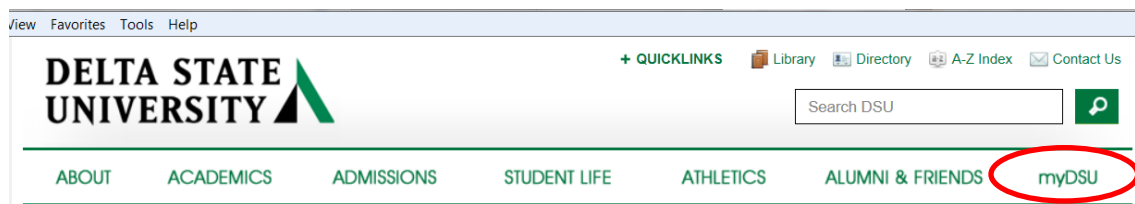
### Accessing EPAF menu in DSU Online Services

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.

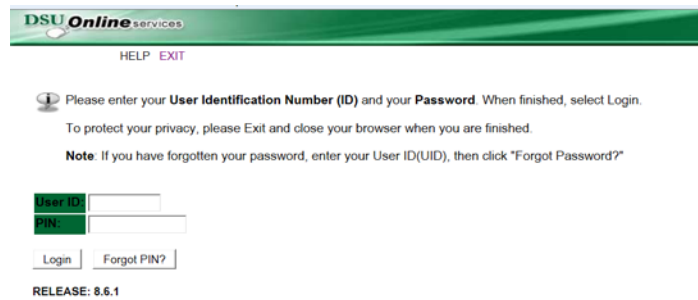
### Accessing Employee Self Service through DSU Online Services

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.



DSU Online services

HELP EXIT

Please enter your **User Identification Number (ID)** and your **Password**. When finished, select Login.

To protect your privacy, please Exit and close your browser when you are finished.

**Note:** If you have forgotten your password, enter your User ID (UID), then click "Forgot Password?"

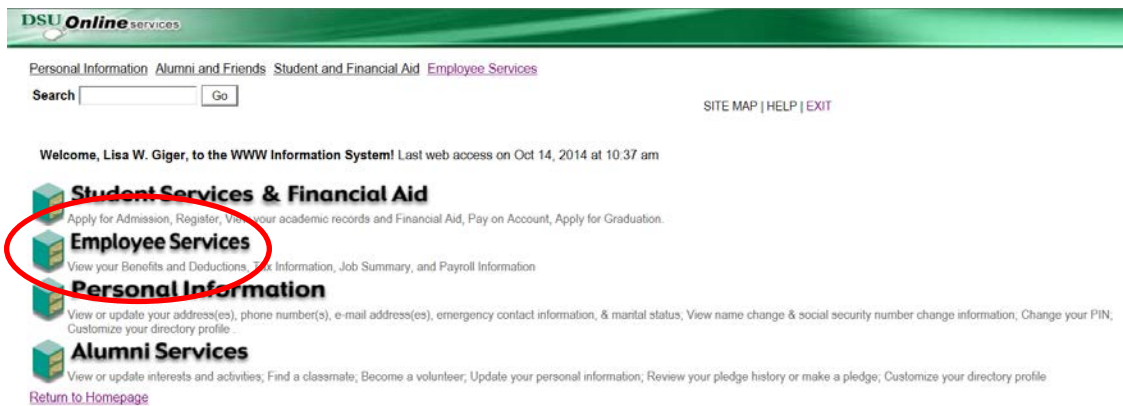
User ID:

PIN:

Login Forgot PIN?

RELEASE: 8.6.1

6. Click on Employee Services.



DSU Online services

Personal Information Alumni and Friends Student and Financial Aid **Employee Services**

Search  Go

SITE MAP | HELP | EXIT

Welcome, Lisa W. Giger, to the WWW Information System! Last web access on Oct 14, 2014 at 10:37 am

**Student Services & Financial Aid**  
Apply for Admission, Register, View your academic records and Financial Aid, Pay on Account, Apply for Graduation.

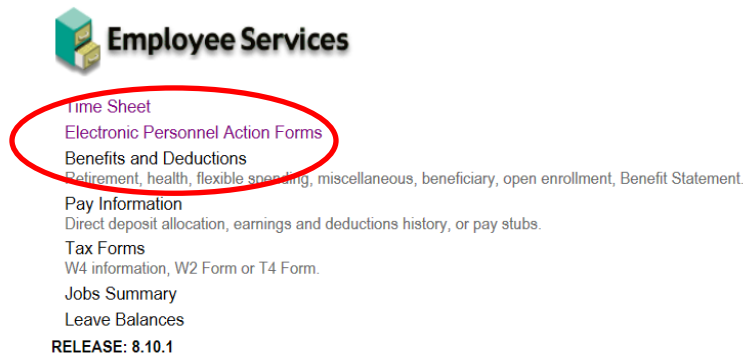
**Employee Services**  
View your Benefits and Deductions, Pay Information, Job Summary, and Payroll Information

**Personal Information**  
View or update your address(es), phone number(s), e-mail address(es), emergency contact information, & marital status; View name change & social security number change information; Change your PIN; Customize your directory profile.

**Alumni Services**  
View or update interests and activities; Find a classmate; Become a volunteer; Update your personal information; Review your pledge history or make a pledge; Customize your directory profile

[Return to Homepage](#)

7. Click on Electronic Personnel Action Forms



**Employee Services**

[Time Sheet](#)

[Electronic Personnel Action Forms](#)

[Benefits and Deductions](#)  
Retirement, health, flexible spending, miscellaneous, beneficiary, open enrollment, Benefit Statement.

[Pay Information](#)  
Direct deposit allocation, earnings and deductions history, or pay stubs.

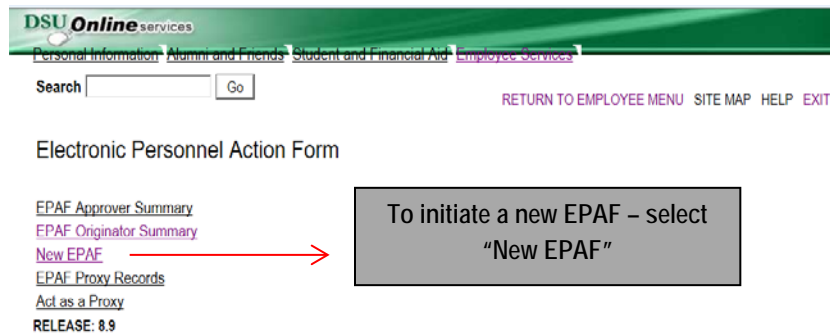
[Tax Forms](#)  
W4 information, W2 Form or T4 Form.

[Jobs Summary](#)

[Leave Balances](#)

RELEASE: 8.10.1

8. Click on New EPAF



DSU Online services

Personal Information Alumni and Friends Student and Financial Aid **Employee Services**

Search  Go

RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT

**Electronic Personnel Action Form**

[EPAF Approver Summary](#)

[EPAF Originator Summary](#)

[New EPAF](#)

[EPAF Proxy Records](#)

[Act as a Proxy](#)

RELEASE: 8.9

To initiate a new EPAF – select  
"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.

**DSU Online services**

[Personal Information](#) [Alumni and Friends](#) [Student and Financial Aid](#) [Employee Services](#)

Search

[RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

### New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID:

Query Date: MM/DD/YYYY

Approval Category:

[EPAF Originator Summary](#)

[Return to EPAF Menu](#)

RELEASE: 8.9

### Person Search

Check the box to limit the search to an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

**Search Criteria**

Employee: ☐

Last Name:

First Name:

Or

ID:

Or

SSN/SIN/TIN:

Records per Page:

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  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.

### Person Search

Check the box to limit the search to an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

**Search Criteria**

Employee: ☐

Last Name:

First Name:

Or

ID:

Or

SSN/SIN/TIN:

Records:

### Person Search Results

To choose a person, select a link under ID.

[EPAF Person Search](#)

[Return to EPAF Menu](#)

[Jump to Bottom](#)

ID	Last Name	First Name	Middle Name	Birth Date	Name Type
<a href="#">900044576</a>	Pagan	Munel	D.		
<a href="#">900008104</a>	Pagan	Juan	Domingo		
<a href="#">900113195</a>	Pagan	Derick	Sean		
<a href="#">900080870</a>	Pagan	Joseph			
<a href="#">900453259</a>	Paganelli	Brenda			
<a href="#">900441794</a>	Pagani	John	C		

1 - 6 of 6

[Return to Top](#)

Click on the ID field in order to select the employee.



Search

[RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

### New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID:

Query Date: MM/DD/YYYY

Approval Category:

Click on the drop down menu to select the personnel action you want to execute from the Approval Category.

[EPAF Originator Summary](#)

[Return to EPAF Menu](#)



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.

DSU Online services

Personal Information Alumni and Friends Student and Financial Aid **Employee Services**

Search

EE MENU SITE MAP HELP EXIT

### New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID:

Query Date: MM/DD/YYYY

Approval Category:

EPAF Approver Summary | [EPAF Originator Summary](#)

[Return to EPAF Menu](#)

DSU Online services

Personal Information Alumni and Friends Student and Financial Aid **Employee Services**

Search

RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT

### New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID:

Query Date: MM/DD/YYYY

Approval Category:

There are no active jobs based on the Query Date.

EPAF Approver Summary | [EPAF Originator Summary](#)

[Return to EPAF Menu](#)

## 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 <u>BOTH</u> 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 <u>BOTH</u> 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 <u>BOTH</u> 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 <u>BOTH</u> 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.

DSU Online services

Personal Information Alumni and Friends Student and Financial Aid **Employee Services**

Search  Go

RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT

### Electronic Personnel Action Form

[EPAF Approver Summary](#)  
[EPAF Originator Summary](#)  
[New EPAF](#)  
[EPAF Proxy Records](#)  
[Act as a Proxy](#)  
RELEASE: 8.9

DSU Online services

Personal Information Alumni and Friends Student and Financial Aid **Employee Services**

Search  Go

RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT

### EPAF Originator Summary

[Current](#) [History](#)

Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

Transaction Status: **All**

[New EPAF](#) | [Default Routing Queue](#) | [Search](#) | [Superuser or Filter Transactions](#)

[Return to EPAF Menu](#)

DSU Online services

Personal Information Alumni and Friends Student and Financial Aid **Employee Services**

Search  Go

RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT

### EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category: **Not Selected**

Approval Level	User Name	Required Action
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

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

## EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.


Approval Category	Not Selected	Go
Approval Queue	Not Selected Overload Spring - Current Faculty/Staff, OVERSP Overload - Continuing Education Non Credit, CONTOL Adjunct Rehire, AJREHI Adjunct Rehire Non Credit Continuing Education, AJRECE Adjunct New Hire, AJNEWH Adjunct New Hire Continuing Education, AJNEWC Update Labor Distribution - Academic Affairs, LABOR Update Labor Distribution - Non Academic Affairs, LABOR1 Employee Termination from DSU (Staff/Hourly), EMTERM Faculty Termination from DSU, FATERM Salary and Title Change - Staff (Current Position), SALCHS Salary and Title Change - Hourly (Current Position), SALCHH New Employee Biographical and Permanent Address, AEMBIO One Time Pay (Overload Faculty/Staff), 1PAYOL Campus Address Add/Change - Faculty, CAADCH Campus Address Add/Change - Staff, CAADST	Not Selected Not Selected Not Selected Not Selected Not Selected

Save and Add New R

Originator Summary

Return to EPAF Menu

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 glass  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

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category	Overload Pay, D00001	Go
-------------------	----------------------	----

### Approval Queue

Approval Level	User Name	Required Action
10 - (CHAIR) Chair		Approve
15 - (DEAN) Dean		Approve
40 - (ACDAFF) Academic Affairs	CBALLARD	Approve
45 - (PROVOS) Provost of Academic Affairs	CMCADAMS	Approve
50 - (HRFYI) HR FYI	SMPHILLIPS	FYI
65 - (BUDGET) Budget Office	CPRICE	Approve
70 - (PAYROL) Payroll FYI (Monthly)	CLITTON	FYI
75 - (HRDIR) Human Resource Director	LGIGER	Approve
99 - (SUPER) Superuser	CLITTON	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected


## 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.

### New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category:

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)

[Return to EPAF Menu](#)

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.

Transaction Status:

[New EPAF](#) | [Default Routing Queue](#) | [Search](#) | [Superuser or Filter Transactions](#)

[Return to EPAF Menu](#)

1 - 2 of 2

[Jump to Bottom](#)

#### EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Donovan, Rylan C. Assistant Professor of Art, 000003-00	900114402	19	Update Labor Distribution - Academic Affairs		Oct 01, 2014	Waiting	<a href="#">Comments</a>
Yarbrough, Teresa B. Miscellaneous Position, 004031-00		85	One Time Pay (Overload Faculty/Staff)		Oct 01, 2014	Waiting	<a href="#">Comments</a>

1 - 2 of 2

[Return to Top](#)

\*\*Comments Exist

[New EPAF](#) | [Default Routing Queue](#) | [Search](#) | [Superuser or Filter Transactions](#)

[Return to EPAF Menu](#)

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)

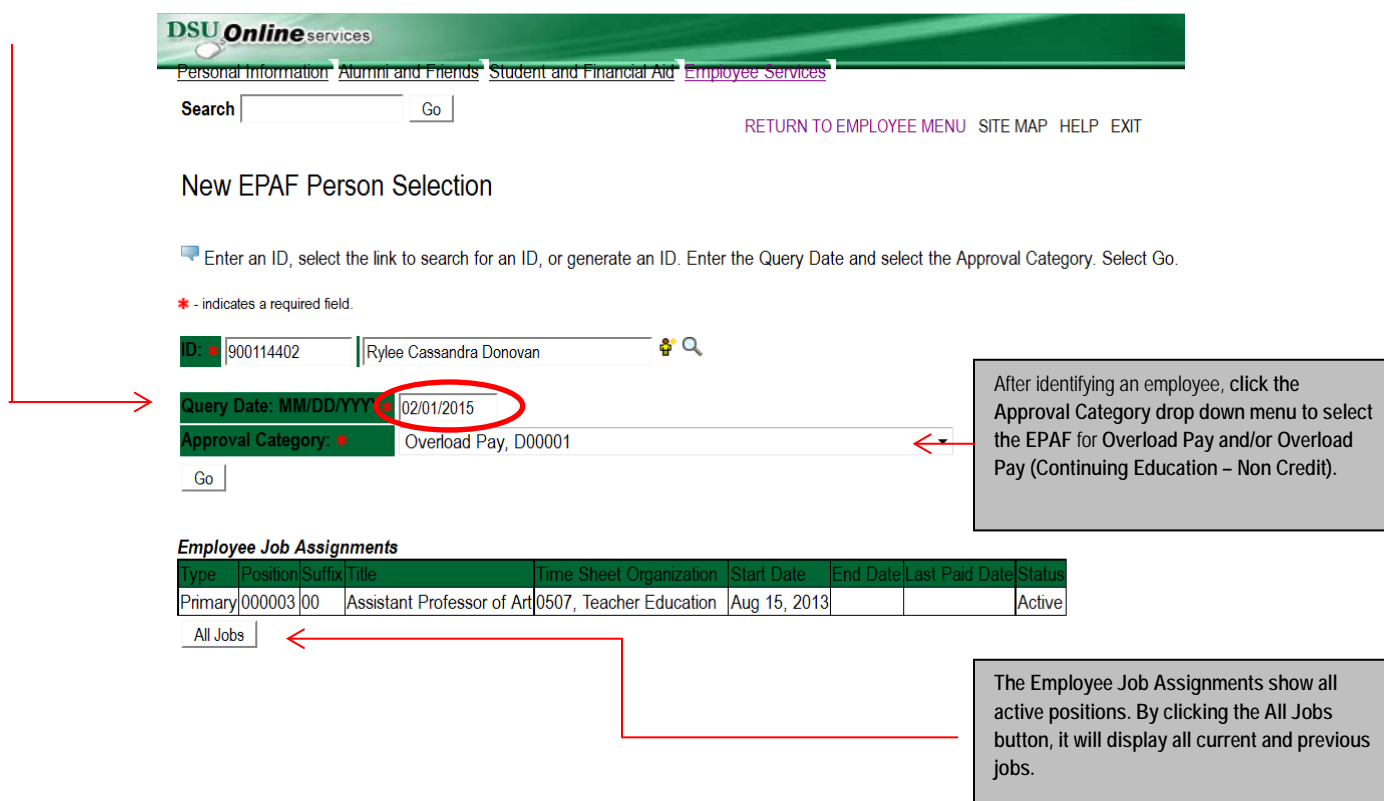
Log into Employee Self Service and choose **ELECTRONIC PERSONNEL ACTION FORMS** and then **NEW EPAF**.

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:
  - o Fall Semester: 09/01/2020 or 09/01/20\_\_
  - o 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.**



DSU Online services

Personal Information Alumni and Friends Student and Financial Aid **Employee Services**


Search  Go

RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT

### New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category:

Go

#### Employee Job Assignments

Type	Position/Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	000003/00	Assistant Professor of Art	0507, Teacher Education	Aug 15, 2013			Active

All Jobs

After identifying an employee, click the Approval Category drop down menu to select the EPAF for Overload Pay and/or Overload Pay (Continuing Education – Non Credit).

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

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 <i>credit hour</i> 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

DSU Online services

Personal Information Admin and Friends Student and Financial Aid **Employee Services**

Search  Go

RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT

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, 900114402

Query Date: Feb 01, 2015

Approval Category: Overload Pay, D00001

Overload/Add Job, OVERSP

Search Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
New Job	000458	00	T Instructor / Gen Acad Instr	3001, General Instruction					<input type="radio"/>
Primary	000005	00	Assistant Professor of Art	0507, Teacher Education	Aug 15, 2013			Active	<input type="radio"/>

All Jobs

Next Approval Type  Go

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

\* - indicates a required field.

#### View Employee Employment Class

Item	Current Value	New Value
Employee Class Code: (Not Enterable) F1, Faculty 9/12		<input type="text"/>
Employee Status: *(Not Enterable) Active		<input type="text" value="A"/>

## 7. Enter Overload Pay Information

Field	Statement/Action	Action/Example
Job Begin Date:	<p>If statement below says "Last Paid Date:....then" →</p> <p><b>Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 Overload ENG 101, Last Paid Date: May 31, 2014</b></p> <p>Item <input type="text"/> Current Value <input type="text"/> New Value <input type="text"/></p> <p>Job Begin Date: MM/DD/YYYY <input type="text"/></p>	Leave field blank
	<p>If statement below says "PT Instructor/Gen Acad Instr", ....then →</p> <p><b>Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 PT Instructor / Gen Acad Instr</b></p> <p>Item <input type="text"/> Current Value <input type="text"/> New Value <input type="text"/></p> <p>Job Begin Date: MM/DD/YYYY <input type="text"/></p>	<p>Enter: (enter corresponding year)</p> <p>09/01/20__ for Fall Semester</p> <p>02/01/20__ for Spring Semester</p>
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.	<p>Example:</p> <p>Overload ENG 101</p>
Annual Salary:	Total amount to be paid for course overloads	3000.00
FTE:	<p>FTE for overload is calculated as follows:</p> <p>.25 = 1 course overload      .75 = 3 course overload .50 = 2 course overload      1.00 = 4 course overload</p> <p>To figure FTE divide the amount to be paid by 12,000 Example: \$300/\$12,000 = .025</p>	<p>Enter the number FTE for the number of course overloads:</p> <p>Example: .25</p>
Contract Type	Field cannot be changed. Information is defaulted.	
Employee Class Code	Field cannot be changed. Information is defaulted.	
Payroll ID	<p>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 →</p> <p>If the employee class under the "View Employee Employment Class" is F2....then →</p> <p><b>View Employee Employment Class</b></p> <p>Item <input type="text"/> Current Value <input type="text"/> New Value <input type="text"/></p> <p>Employee Class Code: (Not Enterable) F1, Faculty 9/12 <input type="text"/></p> <p>Employee Status: *(Not Enterable) Active <input type="text"/></p>	<p>Payroll ID M1 should remain defaulted.</p> <p>Use the drop down box to change to M2.</p>
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)	0	
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

- 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.

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

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

21

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"

Current													
Effective Date: 02/01/2015													
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
New													
Effective Date: MM/DD/YYYY 02/01/2015													
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
1		10	3001	61200	0101					00			
1		10	3001	61200	0101					30.00			
1		340231	3001	61200	0101					70.00			
Total										100.00			

Default from Index | **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.

Current													
Effective Date: 02/01/2015													
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
New													
Effective Date: MM/DD/YYYY 02/01/2015													
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
1		10	3001	61200	0101					00			
1		10	3001	61200	0101					30.00			
1		340231	3001	61200	0101					70.00			
Total										100.00			

Default from Index | **Save and Add New Rows**

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

Current												
Effective Date: 02/01/2015												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override End Date
Now												
Effective Date: MM/DD/YYYY 02/01/2015												
1		10	3001	61200	0101					30.00		
1		340231	3001	61200	0101					70.00		
Total										100.00		

Default from Index | Save and Add New Rows

### 11. Routing Queue

- o 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.
- o For Overloads, all EPAFs must have a Chair and Dean level approval.
- o For Grants, all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office. Other approval levels will default.
- o 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 <input type="checkbox"/>
40 - (ACDAFF) Academic Affairs	CBALLARD	Cheryl M Ballard	Approve <input type="checkbox"/>
45 - (PROVOS) Provost of Academic Affairs	CMCADAMS	Charles Alan McAdams	Approve <input type="checkbox"/>
50 - (HRFYI) HR FYI	SMPHILLIPS	Samantha Myers Phillips	FYI <input type="checkbox"/>
65 - (BUDGET) Budget Office	CPRICE	Crystal S Price	Approve <input type="checkbox"/>
70 - (PAYROL) Payroll FYI (Monthly)	CLITTON	Charlotte M Litton	FYI <input type="checkbox"/>
75 - (HRDIR) Human Resource Director	LGIGER	Lisa Weeks Giger	Approve <input type="checkbox"/>
99 - (SUPER) Superuser	CLITTON	Charlotte M Litton	Apply <input type="checkbox"/>
Not Selected		Not Selected	<input type="checkbox"/>
Not Selected		Not Selected	<input type="checkbox"/>
Not Selected		Not Selected	<input type="checkbox"/>
Not Selected		Not Selected	<input type="checkbox"/>

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:

#### 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.

### 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

### Electronic Personnel Action Form

✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

Name and ID:	Rylee Cassandra Donovan, 900114402	Query Date:	Oct 03, 2014
Transaction:	15		
Transaction Status:	Waiting		
Approval Category:	Overload Spring 2015 - Current Faculty/Staff, OVERSP		
<input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Delete"/>			

### 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.



## Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Name and ID: Rylee Cassandra Donovan, 900114402

Transaction: 15

Query Date: Oct 03, 2014

Transaction Status: Pending

Approval Category: Overload Spring 2015 - Current Faculty/Staff, OVERSP

### 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:
  - o Fall Semester: 09/01/2020 or 09/01/20\_\_
  - o 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.**

### New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category:

After identifying an employee, click the Approval Category drop down menu to select the EPAF for Adjunct Rehire and/or Adjunct Rehire (Continuing Education – Non Credit).

### Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Secondary	000478	00	Adjunct Instr Teach Ed	0387, Social Science	Feb 01, 2015	May 31, 2015		Active

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

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 <i>credit hour</i> 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	0004030	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	 <input type="text"/>
Distribution Orgn:	0387, Social Science	 <input type="text"/>
Current Hire Date: MM/DD/YYYY(Not Enterable)	09/01/2014	<input type="text"/>
Employee Status: *(Not Enterable)	Terminated	<input type="text" value="A"/>
Employee Class Code:	F3, Faculty P/T < 9 Months	 <input type="text"/>
Home COAS: *(Not Enterable)	1	<input type="text" value="1"/>
Term Reason Code: *(Not Enterable)	JE, Job ends	<input type="text" value="JE"/>
Termination Date: MM/DD/YYYY*(Not Enterable)	12/31/2014	<input type="text" value="05/31/2015"/>
Last Work Date: MM/DD/YYYY*(Not Enterable)		<input type="text" value="-"/>

## 8. Add Employee Job – See table below for instructions

Field	Statement/Action	Action/Example																																										
Job Begin Date:	<p>In the Current Value Column, if the current information is population, then →</p> <p><b>Add Employee Job, 000458-00 Adjunct Instr Social Scie</b></p> <table border="1"> <thead> <tr> <th>Item</th><th>Current Value</th><th>New Value</th></tr> </thead> <tbody> <tr> <td>Job Begin Date: MM/DD/YYYY(Not Enterable)</td><td>09/01/2014</td><td></td></tr> <tr> <td>Jobs Effective Date: MM/DD/YYYY(Not Enterable)</td><td>09/01/2014</td><td>02/01/2015</td></tr> <tr> <td>Personnel Date: MM/DD/YYYY(Not Enterable)</td><td>09/01/2014</td><td>02/01/2015</td></tr> <tr> <td>Contract Type:</td><td>Primary</td><td>Primary</td></tr> <tr> <td>Title: *</td><td>Adjunct Instr Social Scie</td><td></td></tr> <tr> <td>Annual Salary: *</td><td>3000</td><td></td></tr> <tr> <td>FTE: *</td><td>.125</td><td></td></tr> <tr> <td>Employee Class Code: *(Not Enterable)</td><td>F3, Faculty P/T &lt; 9 Months</td><td>F3</td></tr> <tr> <td>Payroll ID: *(Not Enterable)</td><td>M2</td><td>M2</td></tr> <tr> <td>Leave Rept Pay ID: *(Not Enterable)</td><td>M2</td><td>M2</td></tr> <tr> <td>Job Change Reason: (Not Enterable)</td><td>ADJUN</td><td>ADJUN</td></tr> <tr> <td>Step: (Not Enterable)</td><td>0</td><td>0</td></tr> <tr> <td>Job Status: (Not Enterable)</td><td>Active</td><td>A</td></tr> </tbody> </table>	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		Annual Salary: *	3000		FTE: *	.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	Leave field blank
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																																											
Annual Salary: *	3000																																											
FTE: *	.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																																										
	<p><u>To Add Position Number:</u></p> <p>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:</p> <p>Fall Semester: 09/01/20__ Spring Semester: 02/01/20__</p> <p><b>Add Employee Job, 004030-00 Adjunct Instructors</b></p> <table border="1"> <thead> <tr> <th>Item</th><th>Current Value</th><th>New Value</th></tr> </thead> <tbody> <tr> <td>Job Begin Date: MM/DD/YYYY</td><td></td><td>02/01/2015</td></tr> <tr> <td>Jobs Effective Date: MM/DD/YYYY(Not Enterable)</td><td></td><td>02/01/2015</td></tr> <tr> <td>Personnel Date: MM/DD/YYYY(Not Enterable)</td><td></td><td>02/01/2015</td></tr> <tr> <td>Contract Type:</td><td></td><td>Secondary</td></tr> <tr> <td>Title: *</td><td></td><td>Adjunct Instr Teach Ed</td></tr> <tr> <td>Annual Salary: *</td><td></td><td>6000.00</td></tr> <tr> <td>FTE: *</td><td></td><td>.25</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>M2</td></tr> <tr> <td>Leave Rept Pay ID: *(Not Enterable)</td><td></td><td>M2</td></tr> <tr> <td>Job Change Reason: (Not Enterable)</td><td></td><td>ADJUN</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> </tbody> </table>	Item	Current Value	New Value	Job Begin Date: MM/DD/YYYY		02/01/2015	Jobs Effective Date: MM/DD/YYYY(Not Enterable)		02/01/2015	Personnel Date: MM/DD/YYYY(Not Enterable)		02/01/2015	Contract Type:		Secondary	Title: *		Adjunct Instr Teach Ed	Annual Salary: *		6000.00	FTE: *		.25	Employee Class Code: *(Not Enterable)		F3	Payroll ID: *(Not Enterable)		M2	Leave Rept Pay ID: *(Not Enterable)		M2	Job Change Reason: (Not Enterable)		ADJUN	Step: (Not Enterable)		0	Job Status: (Not Enterable)		A	<p>Enter: (enter corresponding year)</p> <p>09/01/20__ for Fall Semester</p> <p>02/01/20__ for Spring Semester</p>
Item	Current Value	New Value																																										
Job Begin Date: MM/DD/YYYY		02/01/2015																																										
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		02/01/2015																																										
Personnel Date: MM/DD/YYYY(Not Enterable)		02/01/2015																																										
Contract Type:		Secondary																																										
Title: *		Adjunct Instr Teach Ed																																										
Annual Salary: *		6000.00																																										
FTE: *		.25																																										
Employee Class Code: *(Not Enterable)		F3																																										
Payroll ID: *(Not Enterable)		M2																																										
Leave Rept Pay ID: *(Not Enterable)		M2																																										
Job Change Reason: (Not Enterable)		ADJUN																																										
Step: (Not Enterable)		0																																										
Job Status: (Not Enterable)		A																																										
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:	<p>FTE for overload &amp; adjunct teaching is calculated as follows:</p> <p>.25 = 1 course overload                      .75 = 3 course overload .50 = 2 course overload                      1.00 = 4 course overload</p> <p>To figure FTE divide the amount to be paid by 12,000    Example: \$3000/\$12,000 = .25</p>	<p>Enter the number FTE for the number of course overloads:</p> <p>Example: .25</p>																																										
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



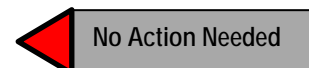
No Action Needed

### 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

- 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.

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

Current

Effective Date: 09/01/2014

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
1		10	3001	61200	0101					100.00		

Screen shot new screen and saving and adding new rows.

New

Effective Date: MM/DD/YYYY

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
1		10	3001	61200	0101					0.00		
Total:										100.00		

Defaulting values for Labor Distribution from the Job records.

Default from Index

Save and Add New Rows

- 31

Click to "Save and Add New Rows"

Current												
Effective Date: 09/01/2014												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
1	10	3001	61200	0101						100.00		
New												
Effective Date: MM/DD/YYYY 02/01/2015												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
Q	f	Q	10	Q	3001	Q	61200	Q	0101	Q		
Q	f	Q	10	Q	3001	Q	61200	Q	0101	Q		
Q	f	Q	340231	Q	0387	Q	61200	Q	0101	Q		
Q		Q		Q		Q		Q		Q		
Q		Q		Q		Q		Q		Q		
Q		Q		Q		Q		Q		Q		
Q		Q		Q		Q		Q		Q		
Total										100.00		

Default from Index | Save and Add New Rows

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

- 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.

Current												
Effective Date: 09/01/2014												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
1	10	3001	61200	0101						100.00		
New												
Effective Date: MM/DD/YYYY 02/01/2015												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
Q	f	Q	10	Q	3001	Q	61200	Q	0101	Q		
Q	f	Q	10	Q	3001	Q	61200	Q	0101	Q		
Q	f	Q	340231	Q	0387	Q	61200	Q	0101	Q		
Q		Q		Q		Q		Q		Q		
Q		Q		Q		Q		Q		Q		
Q		Q		Q		Q		Q		Q		
Total										100.00		

Default from Index | Save and Add New Rows

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

Current												
Effective Date: 09/01/2014												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
1	10	3001	61200	0101						100.00		
New												
Effective Date: MM/DD/YYYY 02/01/2015												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
Q	f	Q	10	Q	3001	Q	61200	Q	0101	Q		
Q	f	Q	340231	Q	0387	Q	61200	Q	0101	Q		
Q		Q		Q		Q		Q		Q		
Q		Q		Q		Q		Q		Q		
Q		Q		Q		Q		Q		Q		
Total										100.00		

Default from Index | Save and Add New Rows

The Labor Distribution has now been entered and the old one removed.



## 12. Routing Queue

- o 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.
- o For Adjunct Rehires, all EPAFs must have a Chair and Dean level approval. Other approval levels will default.
- o For Grants, all EPAFs must have a Chair, Dean, Grants, and Grants Budget Office. Other approval levels will default.
- o 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	<input type="text"/>	Approve	<input type="checkbox"/>
15 - (DEAN) Dean	<input type="text"/>	Approve	<input type="checkbox"/>
39 - (ACAFF1) Academic Affairs (Hayley)	HMURRELL Hayley Henderson Pinion	Approve	<input type="checkbox"/>
40 - (ACDAFF) Academic Affairs	CBALLARD Cheryl M Ballard	Approve	<input type="checkbox"/>
45 - (PROVOS) Provost of Academic Affairs	CMCADAMS Charles Alan McAdams	Approve	<input type="checkbox"/>
50 - (HRFYI) HR FYI	SMPHILLIPS Samantha Myers Phillips	FYI	<input type="checkbox"/>
65 - (BUDGET) Budget Office	CPRICE Crystal S Price	Approve	<input type="checkbox"/>
70 - (PAYROL) Payroll FYI (Monthly)	CLITTON Charlotte M Litton	FYI	<input type="checkbox"/>
75 - (HRDIR) Human Resource Director	LGIGER Lisa Weeks Giger	Approve	<input type="checkbox"/>
99 - (SUPER) Superuser	CLITTON Charlotte M Litton	Apply	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>

Save and Add New Rows

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

## 14. Comments

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

### Electronic Personnel Action Form

✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

Name and ID:	Olivia Caden Silver, 900114404	Query Date:	Feb 01, 2015
Transaction:	145		
Transaction Status:	Waiting		
Approval Category:	Adjunct Faculty Re-Appointment, D00003		
<input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Delete"/>			

## 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.

### Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Name and ID:	Olivia Caden Silver, 900114404	Query Date:	Feb 01, 2015
Transaction:	145		
Transaction Status:	Pending		
Approval Category:	Adjunct Faculty Re-Appointment, D00003		

## 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.**

#### New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category:

After identifying an employee, click the Approval Category drop down menu to select the EPAF for Summer School Overload Pay and/or Summer School Overload Pay (Continuing Education – Non Credit).

#### Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet	Organization	Start Date	End Date	Last Paid Date	Status
Primary	000201	00	Dir Field Experiences & Profes	0507,	Teacher Education	Sep 01, 2013			Active

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

- 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 <i>credit hour</i> 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
<input type="text"/>	New Job	000468	00	Summer School	1701, Summer School					<input checked="" type="radio"/>
	Primary	000201	00	Dir Field Experiences & Profes	0507, Teacher Education	Sep 01, 2013			Active	<input type="radio"/>

All Jobs

Next Approval Type Go

- 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.
  - 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		<input type="text"/>
Employee Status: *(Not Enterable) Active		<input type="text" value="A"/>



- Enter Overload Pay Information

Field	Statement/Action	Action/Example																																																
Job Begin Date:	<p>If the "Current Value" column is populated, then →</p> <p><b>Overload/Add Job, 000468-00 SSII HIS 104, Last Paid Date: Jul 30, 2018</b></p> <table border="1"> <thead> <tr> <th>Item</th><th>Current Value</th><th>New Value</th></tr> </thead> <tbody> <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 &lt; 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> </tbody> </table>	Item	Current Value	New Value	Job Begin Date: MM/DD/YYYY	06/01/2015		Jobs Effective Date: MM/DD/YYYY(Not Enterable)	07/30/2018	06/01/2019	Personnel Date: MM/DD/YYYY(Not Enterable)	07/30/2018	06/01/2019	Contract Type:	Overload	Overload ▾	Title: *	SSII HIS 104		Annual Salary: *	1500		FTE: *	.25		Employee Class Code: *(Not Enterable)	F3, Faculty P/T < 9 Months	F3	Payroll Id: *(Not Enterable)	SU	M1	Time Entry Type: (Not Enterable)	Payroll Time Entry	P	Time Entry Type: (Not Enterable)	None	N	Leave Rept Pay ID: *(Not Enterable)	SU	M1	Job Change Reason: (Not Enterable)	JBEND	OVER	Step: (Not Enterable)	0	0	Job Status: (Not Enterable)	Terminated	A	Leave "Job Begin Date" field blank
Item	Current Value	New Value																																																
Job Begin Date: MM/DD/YYYY	06/01/2015																																																	
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Time Entry Type: (Not Enterable)	Payroll Time Entry	P																																																
Time Entry Type: (Not Enterable)	None	N																																																
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Job Change Reason: (Not Enterable)	JBEND	OVER																																																
Step: (Not Enterable)	0	0																																																
Job Status: (Not Enterable)	Terminated	A																																																
	<p>If the "Current Value" field is not populated, then, →</p> <p><b>Overload/Add Job, 000468-00 Summer School</b></p> <table border="1"> <thead> <tr> <th>Item</th><th>Current Value</th><th>New Value</th></tr> </thead> <tbody> <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> </tbody> </table>	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: *			Annual Salary: *			FTE: *			Employee Class Code: *(Not Enterable)		F3	Payroll Id: *(Not Enterable)		SU	Time Entry Type:		Not Selected ▾	Time Entry Type:		Not Selected ▾	Leave Rept Pay ID: *(Not Enterable)		SU	Job Change Reason: (Not Enterable)		OVER	Step: (Not Enterable)		0	Job Status: (Not Enterable)		A	<p>Enter: (enter corresponding dates)</p> <p>06/01/20__ - Summer School I</p> <p>07/01/20__ - for Summer School II</p>
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: *																																																		
Annual Salary: *																																																		
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Job Change Reason: (Not Enterable)		OVER																																																
Step: (Not Enterable)		0																																																
Job Status: (Not Enterable)		A																																																
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.	<p>Example:</p> <p>Summer School ART 101</p> <p>OR</p> <p>SSI ART 101/ART 103</p>																																																
Annual Salary:	Total amount to be paid for course overloads	3000.00																																																
FTE:	<p>FTE for overload is calculated as follows:</p> <p>.25 = 1 course overload      .75 = 3 course overload</p> <p>.50 = 2 course overload      1.00 = 4 course overload</p>	<p>Enter the number FTE for the number of course overloads:</p> <p>Example: .25</p>																																																
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 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

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

- 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.

#### Update Default Earnings, 000468-00 Summer School

Current									
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date	Remove		
New Value									
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY	Remove		
	Not Selected				1				
	Not Selected				1				
	Not Selected				1				
	Not Selected				1				

- Enter 06/01/20\_\_ for Summer School I or 07/01/20\_\_ for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.
- Select SUM, Summer Pay as the Earnings Code using the drop down box.
- 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	Remove		
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.

Update Default Earnings, 000468-00 Summer School II Instructor, Last Paid Date: Jul 30, 2013

Current						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
06/01/2013	SUM, Summer Pay	84.00			1	

New Value						
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY Remove
06/01/2013	SUM, Summer Pay	84.00			1	
	Not Selected				1	
	Not Selected				1	
	Not Selected				1	
	Not Selected				1	

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

✓ Defaulting values for Default Earnings from the Job records.  
Save and Add New Rows

#### • 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: 06/01/20\_\_ or 07/01/20\_\_ depending on the summer school session and the appropriate year.
- 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.

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
Q	1	Q	10	Q	1701	Q	61200	Q	0103	Q	
Q		Q		Q		Q		Q		100.00	
Q		Q		Q		Q		Q			
Q		Q		Q		Q		Q			
Q		Q		Q		Q		Q			
Total:										100.00	

✓ Default from Index Save and Add New Rows

Make sure the date listed in the ‘EFFECTIVE DATE’ field is:

Summer School I: 06/01/20\_\_  
Summer School II: 07/01/20\_\_



## 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.

### 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
1		10	1701	61200	0103					100.00			
<b>Total:</b>										100.00			

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

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 changed to the following:

Summer School I: 06/01/20\_\_

Summer School II: 07/01/20\_\_

Change this percentage to 0.00 and click on 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
1		10	1701	61200	0103					0.00			
<b>Total:</b>										100.00			

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

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
1		10	1701	61200	0103					0.00			
1		10	1701	61200						25.00			
1		340231	4155	61200						75.00			
<b>Total:</b>										100.00			

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

Default from Index Save and Add New Rows

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

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.

#### 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													
Q	1	Q	10	Q	1701	Q	61200	Q	0103				
Q	1	Q	10	Q	1701	Q	61200	Q	0103		25.00		
Q	1	Q	340231	Q	4155	Q	61200	Q	0609		75.00		
Q		Q		Q		Q		Q					
Q		Q		Q		Q		Q					
Q		Q		Q		Q		Q					
Total:										100.00			

Default from Index **Save and Add New Rows**

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	Q	Approve	
15 - (DEAN) Dean	Q	Approve	
39 - (ACAFF1) Academic Affairs (Hayley)	Q HMURRELL Hayley Henderson Pinion	Approve	
40 - (ACDAFF) Academic Affairs	Q CBALLARD Cheryl M Ballard	Approve	
45 - (PROVOS) Provost of Academic Affairs	Q CMCADAMS Charles Alan McAdams	Approve	
50 - (HRFYI) HR FYI	Q SMPHILLIPS Samantha Myers Phillips	FYI	
65 - (BUDGET) Budget Office	Q CPRICE Crystal S Price	Approve	
70 - (PAYROL) Payroll FYI (Monthly)	Q CLITTON Charlotte M Litton	FYI	
75 - (HRDIR) Human Resource Director	Q LGIGER Lisa Weeks Giger	Approve	
99 - (SUPER) Superuser	Q CLITTON Charlotte M Litton	Apply	
Not Selected	Q	Not Selected	
Not Selected	Q	Not Selected	
Not Selected	Q	Not Selected	
Not Selected	Q	Not Selected	

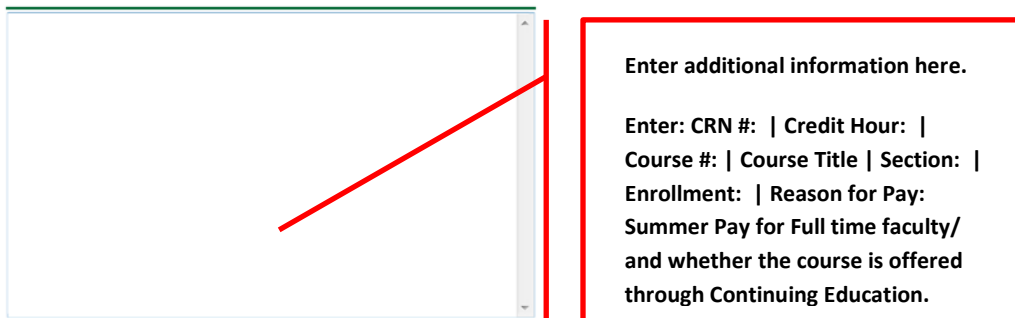
Save and Add New Rows

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

Comment



Enter additional information here.

Enter: CRN #: | Credit Hour: |  
Course #: | Course Title | Section: |  
Enrollment: | Reason for Pay:  
Summer Pay for Full time faculty/  
and whether the course is offered  
through Continuing Education.

## 11. Save EPAPF

- 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

## Electronic Personnel Action Form

✓ Your change was saved successfully.  
Enter the information for the EPAPF and either Save or Submit

Name and ID:	Rylee Cassandra Donovan, 900127333	
Transaction:	1636	Query Date: Jun 01, 2016
Transaction Status:	Waiting	
Approval Category:	Summer School Overload, D00040	

## 12. Submit EPAPF

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

## Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

<b>Name and ID:</b>	Rylee Cassandra Donovan, 900127333		
<b>Transaction:</b>	1636	<b>Query Date:</b>	Jun 01, 2016
<b>Transaction Status:</b>	Pending		
<b>Approval Category:</b>	Summer School Overload, D00040		

### 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)

## New EPAF Person Selection

 Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID: \*   

Query Date: MM/DD/YYYY

Approval Category: \*

After identifying an employee, click the Approval Category drop down menu to select the Summer School EPAF for Adjunct Rehire and/or Adjunct Rehire (Continuing Education – Non Credit).

### Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	000377	00	Human Resources Assistant	4113, Human Resource	Jan 01, 2014			Active
Secondary	000458	00	Square dance instructor	0387, Social Science	Sep 01, 2014	May 31, 2015		Terminated
Secondary	000478	00	Adjunct Instr Teach Ed	0387, Social Science	Feb 01, 2015	May 31, 2015		Terminated

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)

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

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 <i>credit hour</i> 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	<input type="text"/>
Distribution Orgn:	0377, Music	<input type="text"/>
Current Hire Date: MM/DD/YYYY(Not Enterable)	01/01/2016	<input type="text"/>
Employee Status: *(Not Enterable)	Active	A <input type="text"/>
Employee Class Code:	F3, Faculty P/T < 9 Months	<input type="text"/>
Home COAS: *(Not Enterable)	1	1 <input type="text"/>
Term Reason Code: (Not Enterable)		JE <input type="text"/>
Termination Date: MM/DD/YYYY(Not Enterable)		06/29/2016 <input type="text"/>
Last Work Date: MM/DD/YYYY(Not Enterable)		06/29/2016 <input type="text"/>

- Enter Overload Pay Information


Field	Statement/Action	Action/Example																																																
Job Begin Date:	<p>If the "Current Value" column is populated, then</p> <p><b>Overload/Add Job, 000468-00 SSII HIS 104, Last Paid Date: Jul 30, 2018</b></p> <table border="1"> <thead> <tr> <th>Item</th><th>Current Value</th><th>New Value</th></tr> </thead> <tbody> <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 &lt; 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> </tbody> </table>	Item	Current Value	New Value	Job Begin Date: MM/DD/YYYY	06/01/2015		Jobs Effective Date: MM/DD/YYYY(Not Enterable)	07/30/2018	06/01/2019	Personnel Date: MM/DD/YYYY(Not Enterable)	07/30/2018	06/01/2019	Contract Type:	Overload	Overload	Title: *	SSII HIS 104		Annual Salary: *	1500		FTE: *	.25		Employee Class Code: *(Not Enterable)	F3, Faculty P/T < 9 Months	F3	Payroll Id: *(Not Enterable)	SU	M1	Time Entry Type: (Not Enterable)	Payroll Time Entry	P	Time Entry Type: (Not Enterable)	None	N	Leave Rept Pay ID: *(Not Enterable)	SU	M1	Job Change Reason: (Not Enterable)	JBEND	OVER	Step: (Not Enterable)	0	0	Job Status: (Not Enterable)	Terminated	A	Leave "Job Begin Date" field blank
Item	Current Value	New Value																																																
Job Begin Date: MM/DD/YYYY	06/01/2015																																																	
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Annual Salary: *	1500																																																	
FTE: *	.25																																																	
Employee Class Code: *(Not Enterable)	F3, Faculty P/T < 9 Months	F3																																																
Payroll Id: *(Not Enterable)	SU	M1																																																
Time Entry Type: (Not Enterable)	Payroll Time Entry	P																																																
Time Entry Type: (Not Enterable)	None	N																																																
Leave Rept Pay ID: *(Not Enterable)	SU	M1																																																
Job Change Reason: (Not Enterable)	JBEND	OVER																																																
Step: (Not Enterable)	0	0																																																
Job Status: (Not Enterable)	Terminated	A																																																
	<p>If the "Current Value" field is not populated, then,</p> <p><b>Add Employee Job, 000468-00 Summer School</b></p> <table border="1"> <thead> <tr> <th>Item</th><th>Current Value</th><th>New Value</th></tr> </thead> <tbody> <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>Secondary</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>Leave Rept Pay ID: *(Not Enterable)</td><td></td><td>SU</td></tr> <tr> <td>Job Change Reason: (Not Enterable)</td><td></td><td>ADJUN</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> </tbody> </table>	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:		Secondary	Title: *			Annual Salary: *			FTE: *			Employee Class Code: *(Not Enterable)		F3	Payroll Id: *(Not Enterable)		SU	Leave Rept Pay ID: *(Not Enterable)		SU	Job Change Reason: (Not Enterable)		ADJUN	Step: (Not Enterable)		0	Job Status: (Not Enterable)		A	<p>Enter: (enter corresponding dates)</p> <p>06/01/20__ - Summer School I</p> <p>07/01/20__ - for Summer School II</p>						
Item	Current Value	New Value																																																
Job Begin Date: MM/DD/YYYY																																																		
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		06/01/2016																																																
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Step: (Not Enterable)		0																																																
Job Status: (Not Enterable)		A																																																
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: Adjunct Instr in Art																																																
Annual Salary:	Total amount to be paid for course overloads	3000.00																																																
FTE:	<p>FTE for overload is calculated as follows:</p> <p>.25 = 1 course overload      .75 = 3 course overload .50 = 2 course overload      1.00 = 4 course overload</p>	<p>Enter the number FTE for the number of course overloads:</p> <p>Example: .25</p>																																																
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 <b>SU</b> . Field can be change.	Payroll ID <b>SU</b> 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 <b>SU</b>
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	 <div>No Action Needed</div>
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	 <div>No Action Needed</div>
Job Status: *(Not Enterable)		T	
Job Change Reason: *(Not Enterable)		JBEND	



- Update Default Earnings

- 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.

**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		
	Not Selected								
	Not Selected								
	Not Selected								
	Not Selected								

- Enter 06/01/20\_\_ for Summer School I or 07/01/20\_\_ for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.
- Select SUM, Summer Pay as the Earnings Code using the drop down box.
- 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							
	Not Selected								
	Not Selected								
	Not Selected								

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.

**Update Default Earnings, 000468-00 Summer School II Instructor, Last Paid Date: Jul 30, 2013**

Current									
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date			
06/01/2013	SUM, Summer Pay	84.00							

New Value									
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY	Remove		
06/01/2013	SUM, Summer Pay	84.00							
	Not Selected								
	Not Selected								
	Not Selected								
	Not Selected								

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

✓ Defaulting values for Default Earnings from the Job records.  
Save and Add New Rows |

- **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: 06/01/20\_\_ or 07/01/20\_\_ depending on the summer school session.
- 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.

**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												
1		10	1701	61200	0103					100.00		
									Total:	100.00		

Default from Index | Save and Add New Rows

Make sure the date listed in the 'EFFECTIVE DATE' field is:

Summer School I: 06/01/20\_\_  
Summer School II: 07/01/20\_\_

**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.

**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												
1		10	1701	61200	0103					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:

Summer School I: 06/01/20\_\_  
Spring Semester: 07/01/20\_\_

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

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

- COA = enter 1.
- Fund No.
- Organization No.
- Account No. = 61200
- 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
Q	1	Q	10	Q	1701	Q	61200	Q	0103		0.00	
Q	1	Q	10	Q	1701	Q	61200	Q		25.00		
Q	1	Q	340231	Q	4155	Q	61200	Q		75.00		
Q		Q		Q		Q		Q				
Q		Q		Q		Q		Q				
Total:										100.00		

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

Default from Index

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.

#### 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	Remove
Q	1	Q	10	Q	1701	Q	61200	Q	0103		0.00		<input checked="" type="checkbox"/>
Q	1	Q	10	Q	1701	Q	61200	Q	0103		25.00		<input type="checkbox"/>
Q	1	Q	340231	Q	4155	Q	61200	Q	0609		75.00		<input type="checkbox"/>
Q		Q		Q		Q		Q					
Q		Q		Q		Q		Q					
Q		Q		Q		Q		Q					
Total:										100.00			

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

Default from Index

#### 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	<input type="text"/>	Approve	<input type="checkbox"/>
15 - (DEAN) Dean	<input type="text"/>	Approve	<input type="checkbox"/>
39 - (ACAFF1) Academic Affairs (Hayley)	HMURRELL	Hayley Henderson Pinion	Approve <input type="checkbox"/>
40 - (ACDAFF) Academic Affairs	CBALLARD	Cheryl M Ballard	Approve <input type="checkbox"/>
45 - (PROVOS) Provost of Academic Affairs	CMCADAMS	Charles Alan McAdams	Approve <input type="checkbox"/>
50 - (HRFYI) HR FYI	SMPHILLIPS	Samantha Myers Phillips	FYI <input type="checkbox"/>
65 - (BUDGET) Budget Office	CPRICE	Crystal S Price	Approve <input type="checkbox"/>
70 - (PAYROL) Payroll FYI (Monthly)	CLITTON	Charlotte M Litton	FYI <input type="checkbox"/>
75 - (HRDIR) Human Resource Director	LGIGER	Lisa Weeks Giger	Approve <input type="checkbox"/>
99 - (SUPER) Superuser	CLITTON	Charlotte M Litton	Apply <input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>

Save and Add New Rows

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

### 18. 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 separated as shown below:
  - CRN #:
  - Credit Hour:
  - Course Number:
  - Course Title:
  - Section:
  - Enrollment:
  - Reason for Adjunct:

Comment

Enter additional information here.

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

### 19. 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

## Electronic Personnel Action Form

✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

**Name and ID:** Olivia Caden Silver, 900127334

**Transaction:** 1637

**Query Date:** Jun 01, 2016

**Transaction Status:** Waiting

**Approval Category:** Summer School Adjunct Rehire, D00042

Save

Submit

Delete

### 20. 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.

## Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

**Name and ID:** Olivia Caden Silver, 900127334

**Transaction:** 1637

**Query Date:** Jun 01, 2016

**Transaction Status:** Pending


**Approval Category:** Summer School Adjunct Rehire, D00042

## 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.**

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category:

After identifying an employee, click the Approval Category drop down menu to select the EPAF for One Time Payment – Extra Services (Non Academic Affairs) or One Time Payment – Extra Services (Academic Affairs).

#### Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	000921	00	Assistant Director	4113, Human Resource	Oct 01, 2015			Active

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

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)

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 <u>FACULTY</u> by fund 10 monies. The fund #s start with 10.
004011	00	One Time Payments – Extra Services paid to <u>STAFF</u> by fund 10 monies. The fund #s start with 10.
004025	00	One Time Payments – Extra Services paid to <u>FACULTY</u> by other funds (not grants). The fund #s usually start with 108. (Example: 108221)
004026	00	One Time Payments – Extra Services paid to <u>STAFF</u> by other funds (not grants). The fund #s usually start with 108. (Example: 108221)
004030	00	One Time Payments – Extra Services paid to <u>FACULTY</u> by grant funding. The fund #s usually start with "3" (Example: 340231)
004031	00	One Time Payments – Extra Services paid to <u>STAFF</u> 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

## New EPAF Job Selection

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

ID: Rylee Olivia Donovan, 900124058

Query Date: Nov 01, 2015

Approval Category: One time Payment (Extra Serv), D00007

### Overload/Add Job, C00006

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job	004026	00	Miscellaneous Position Fund 25	41211, Other General Institutional					
	Primary	000921	00	Assistant Director	4113, Human Resource	Oct 01, 2015			Active	

All Jobs

Next Approval Type Go

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

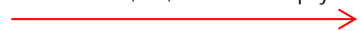
Item	Current Value	New Value
Employee Class Code: (Not Enterable) S1, Full Time Staff		
Employee Status: * (Not Enterable) Active		A

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:	<p>If statement below says "Last Paid Date:.....then" →</p> <p><b>Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 Overload ENG 10, Last Paid Date: May 31, 2014</b></p> <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> </table> <p>If there is no current values in the "Current Value" fields,.....then →</p> <p><b>Overload/Add Job, 004026-00 Miscellaneous Position Fund 25</b></p> <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> </table>	Item	Current Value	New Value	Job Begin Date: MM/DD/YYYY			Item	Current Value	New Value	Job Begin Date: MM/DD/YYYY			<p>Leave field blank</p> <p>Enter: (enter corresponding year)</p> <p>MM/01/20__ Ex. 02/01/2020</p>						
Item	Current Value	New Value																		
Job Begin Date: MM/DD/YYYY																				
Item	Current Value	New Value																		
Job Begin Date: MM/DD/YYYY																				
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:	<p>Enter the description of the one time payment – extra services performed</p> <p><b>Overload/Add Job, 004026-00 Miscellaneous Position Fund 25</b></p> <table> <tr> <th>Item</th><th>Current Value</th><th>New Value</th></tr> <tr> <td>Job Begin Date: MM/DD/YYYY</td><td>11/01/2015</td><td></td></tr> <tr> <td>Jobs Effective Date: MM/DD/YYYY</td><td>11/01/2015</td><td></td></tr> <tr> <td>Personnel Date: MM/DD/YYYY</td><td>11/01/2015</td><td></td></tr> <tr> <td>Contract Type:</td><td>Overload</td><td></td></tr> <tr> <td>Title: *</td><td>Basketball Ticket Worker</td><td></td></tr> </table>	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		<p>Example:</p> <p>Basketball Ticket Worker</p> <p>First Year Seminar Instructor (used pos 001202 00)</p>
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																			
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	<p>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 →</p> <p>If the employee class under the "View Employee Employment Class" is S2, F2, F3, ST, GA....then →</p>	<p>Use the drop down box to change to M1.</p> <p>Payroll ID should remain defaulted to M2.</p>																		



	<p>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. </p> <p><b>View Employee Employment Class</b></p> <table border="1"> <thead> <tr> <th>Item</th><th>Current Value</th><th>New Value</th></tr> </thead> <tbody> <tr> <td>Employee Class Code: (Not Enterable)</td><td>S1, Full Time Staff</td><td><input type="text"/></td></tr> <tr> <td>Employee Status: *(Not Enterable)</td><td>Active</td><td>A</td></tr> </tbody> </table>	Item	Current Value	New Value	Employee Class Code: (Not Enterable)	S1, Full Time Staff	<input type="text"/>	Employee Status: *(Not Enterable)	Active	A	Payroll ID will either be M1 or M2 based on previous job assignments.
Item	Current Value	New Value									
Employee Class Code: (Not Enterable)	S1, Full Time Staff	<input type="text"/>									
Employee Status: *(Not Enterable)	Active	A									
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/Add Job, 004026-00 Miscellaneous Position Fund 25

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		08/01/2016
Jobs Effective Date: MM/DD/YYYY		08/01/2016
Personnel Date: MM/DD/YYYY		08/01/2016
Contract Type:		Overload
Title: *		Basketball Ticket Worker
Annual Salary: *		50.00
FTE: *		
Employee Class Code: *		S3
Payroll Id: *		M1, Monthly
Time Entry Type: (Not Enterable)		P
Time Entry Type: (Not Enterable)		N
Leave Rept Pay ID: *		M1, Monthly
Job Change Reason: (Not Enterable)		ONE
Step: (Not Enterable)		0
Job Status: (Not Enterable)		A

#### View Employee Employment Class

Item	Current Value	New Value
Employee Class Code: (Not Enterable)	S1, Full Time Staff	<input type="text"/>
Employee Status: *(Not Enterable)	Active	A

#### 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

- 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

#### 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		
	Not Selected				1				
	Not Selected				1				
	Not Selected				1				
	Not Selected				1				

Save and Add New Rows

- 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
- Select REG, Regular as the Earnings Code using the drop down box.
- 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 1<sup>st</sup> day of the month in which the payment is to be paid. MM/01/20\_\_ **EXAMPLE: 02/01/2020**

Update Default Earnings, 004030-00 HRSA Nursing, Last Paid Date: Jun 30, 2015

Current						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
07/01/2014	REG, Regular Pay	84.00			1	

New Value									
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY	Remove		
07/01/2014	REG, Regular Pay	84.00			1				

<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Enter the 1<sup>st</sup> day of the month in which the payment is to be paid:  
EXAMPLE: 02/01/2020

✓ Defaulting values for Default Earnings from the Job records.

Save and Add New Rows

### EXAMPLE OF THE DEFAULT EARNINGS SCREEN WITH THE UPDATED DATE

Update Default Earnings, 004030-00 HRSA Nursing, Last Paid Date: Jun 30, 2015

Current						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
07/01/2014	REG, Regular Pay	84.00			1	

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				
<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			

✓ Defaulting values for Default Earnings from the Job records.

Save and Add New Rows

## 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

- 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.
- 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
- 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.

#### 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													
Q	1	Q	108601	Q	41211	Q	61300	Q	0605		100.00		
Q		Q		Q		Q		Q					
Q		Q		Q		Q		Q					
Q		Q		Q		Q		Q					
Q		Q		Q		Q		Q					
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.  
MM/01/20\_\_  
EXAMPLE: 02/01/2021

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, 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													
Q	1	Q	108601	Q	41211	Q	61300	Q	0605		0.00		
Q		Q		Q		Q		Q					
Q		Q		Q		Q		Q					
Q		Q		Q		Q		Q					
Q		Q		Q		Q		Q					
Total:										100.00			

Default from Index Save and Add New Rows

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

**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					.00			
1		108522	4021	61300						100			
Total										.00			

Default from Index **Save and Add New Rows**

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

- 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**

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					.00			
1		108522	4021	61300						100			
Total										.00			

Default from Index **Save and Add New Rows**

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

Current												
Effective Date: 11/01/2015												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date

- 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. 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 = Crystal Price (CPRICE)
  - v. Payroll = Charlotte Litton (CLITTON)
  - vi. HR Director = Lisa Giger (LGIGER)
  - vii. Super = Charlotte Litton (CLITTON)

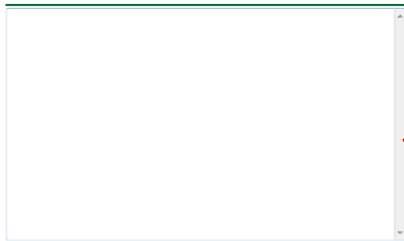
- a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- b. For Academic One-Time Payment – Extra Services, all EPAFs must have a Chair and Dean level approval.
- c. For Academic Grants 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 = Crystal Price (CPRICE)
  - 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.

Comment



Enter additional  
information here.

Comment

Basketball Ticket Worker: Worked on 10-23-2015, 10-25-2015

EXAMPLE of what a  
comment might  
contain.

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

## Electronic Personnel Action Form

✓ Your change was saved successfully.  
Enter the information for the EPAF and either Save or Submit

Name and ID:	Rylee Olivia Donovan, 900124058	Query Date:	Nov 01, 2015
Transaction:	876		
Transaction Status:	Waiting		
Approval Category:	One Time Payment - Extra Services (Non Academic Affairs), D00007		

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.

## Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Name and ID: Rylee Olivia Donovan, 900124058

Transaction: 876

Query Date: Nov 01, 2015

Transaction Status: Pending

Approval Category: One Time Payment - Extra Services (Non Academic Affairs), D00007

### 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.**

#### New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category:

After identifying an employee, click the Approval Category drop down menu to select the EPAF for Termination from DSU (Non Academic Affairs) or Termination from DSU (Academic Affairs).

#### Employee Job Assignments

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

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

- Click on **GO** to begin processing the EPAF.
- Click the radial button at the end of the row for the **PRIMARY JOB** and click **GO**.

## New EPAF Job Selection

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:** Jan 31, 2018  
**Approval Category:** Termination from DSU NAA, D00010

### Terminate Job Only, C00003

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job	<input type="text"/>	<input type="text"/>	<input type="text"/>						<input type="radio"/>
	Primary	000376	00	Grants Coordinator	4113, Human Resource	Jan 01, 2017			Active	<input checked="" type="radio"/>

Find the primary job and click the radial button at the end of the job to select the job and click "GO".

All Jobs

Go

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

### Terminate Job Only, 000376-00 Grants Coordinator

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY *	01/01/2017	<input type="text" value="01/31/2018"/>
Job Status: *(Not Enterable)	Active	<input type="text" value="T"/>
Job Change Reason: *(Not Enterable)		<input type="text" value="TERM"/>

In the Jobs Effective Date Field, enter the date the employee is to receive pay through

In the Last Work Date Field, enter the last date the employee was physically at work.

### Terminate Employee from DSU

Item	Current Value	New Value
Last Work Date: MM/DD/YYYY *		<input type="text" value="01/26/2018"/>
Term Reason Code: *		<input type="text" value="V, Voluntary"/>
Termination Date: MM/DD/YYYY *		<input type="text" value="01/31/2018"/>

In the Term Reason Code, select the reason from the drop down box for Termination/Resignation

In the Termination Date field, enter the last day the employee is to be paid for.

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

### Display Salary Information

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	09/01/2017	
Regular Rate: (Not Enterable)		
Annual Salary: (Not Enterable)		

In the Jobs Effective Date Field, enter the date the employee is to receive pay through

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

### View Labor Distribution

Last Paid Date: Jun 30, 2018

Current											
Effective Date: 09/01/2013											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	0387	61200	0101					100.00	

In the Effective Date Field, enter the date the employee is to receive pay through

New											
Effective Date: MM/DD/YYYY 07/24/2018											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	0387	61200	0101					100.00	
Total:										100.00	

✓ Defaulting values for Labor Distribution from the Job records.

Default from Index Save and Add New Rows

### 13. Routing Queue

#### Non Academic Affairs:

- 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.
- All EPAFs must have a Director and Vice President level approval.**
- 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.
- EXAMPLE ROUTING QUEUE:**
  - Dept (Director/Supervisor)
  - Vice President
  - HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
  - Budget = Crystal Price (CPRICE)
  - Payroll FYI = Charlotte Litton (CLITTON)
  - HR2 = Rachel Becker (RBECKER for employees paid monthly) or Rebecca Bouse (RBOUSE for employees paid bi-weekly)
  - HR Director = Lisa Giger (LGIGER)
  - 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 = Crystal Price (CPRICE)
  - 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

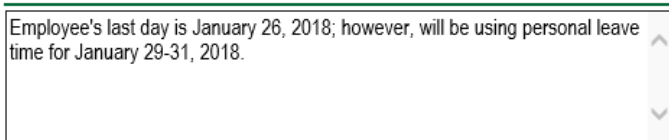
- In the "Comments" section, enter comments for the approvers with an explanation for the action.

Comment



Enter additional  
information here.

Comment



EXAMPLE of what a  
comment might  
contain.

### 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

## Electronic Personnel Action Form

✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

Name and ID:	Rylie Ann Clark, 900137172	Job and Suffix:	000376-00, Grants Coordinator
Transaction:	4009	Query Date:	Jan 31, 2018
Transaction Status:	Waiting	Last Paid Date:	
Approval Category:	Termination from DSU (Non Academic Affairs), D00010		
<input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Delete"/>			

### 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.

Search

[RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

## Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Name and ID:	Rylie Ann Clark, 900137172	Job and Suffix:	000376-00, Grants Coordinator
Transaction:	4010	Query Date:	Jan 31, 2018
Transaction Status:	Pending	Last Paid Date:	
Approval Category:	Termination from DSU (Non Academic Affairs), D00010		

## 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 1<sup>st</sup> day of the month, then use the first day of the month. See examples below.

#### New EPAF Person Selection

 Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category:

This employee's title and salary will change on March 11, 2021. Enter 03/11/2021 in the query date block.


#### Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	000376	00	HR Director	4113, Human Resource	Jan 01, 2017			Active

#### New EPAF Person Selection

 Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category:

This employee's title and salary will change on April 1, 2021. Enter 04/01/2021 in the query date block.

#### Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	000376	00	HR Director	4113, Human Resource	Jan 01, 2017			Active

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.**

**New EPAF Person Selection**

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID:  | Rylie A

Query Date: MM/DD/YYYY

Approval Category:

**Employee Job Assignments**

Type	Position	Suffix	Title	Use
Primary	000376	00	HR Director	<input checked="" type="radio"/>

Not Selected  
Overload Pay, D00001  
Overload Pay - Continuing Education, D00002  
Adjunct Faculty Re-Appointment, D00003  
Adjunct Faculty Re-Appointment (Continuing Education), D00004  
Title and/or Salary Adjustment (Academic Affairs), D00011  
Title and/or Salary Adjustment (Non Academic Affairs), D00012  
Hourly Title and/or Rate Adjustment (Academic Affairs), D00013  
Hourly Title and/or Rate Adjustment (Non Academic Affairs), D00014  
One Time Payment - Extra Services (Non Academic Affairs), D00007  
One Time Payment - Extra Services (Academic Affairs), D00008  
Job Labor Distribution Change (Academic Affairs), D00015  
Job Labor Distribution Change (Non Academic Affairs), D00016  
Campus Address Change (Academic Affairs), D00022  
Campus Address Change (Non Academic Affairs), D00023  
Termination from DSU (Academic Affairs), D00009  
Termination from DSU (Non Academic Affairs), D00010

[Approver Summary](#) | [EPAF Originator Summary](#)

Use EPAFs D00011 and D00012 to change a salaried employee's title and/or salary and click "GO".

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

**New EPAF Job Selection**

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

ID:

Query Date:

Approval Category:

**Change Faculty/Staff Employee's Current Title and/or Salary, C00022**

Search	Type	Position	Suffix	Title	Time Sheet	Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text" value="New Job"/>											<input type="radio"/>
	Primary	000376	00	HR Director		4113, Human Resource	Jan 01, 2017			Active	<input checked="" type="radio"/>

Select the employee's primary job by clicking on the radial button and click **GO**.



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
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

### View Employee Employment Class

Item	Current Value	New Value
Employee Class Code:	S1, Full Time Staff	<input type="text"/>
Employee Status: (Not Enterable) Active		<input type="text" value="A"/>

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.

- JOB BEGIN DATE:** No entry – leave blank
- JOB EFFECTIVE DATE:** Enter the effective date of the salary and/or title change.
- PERSONNEL DATE:** Enter the effective date of the salary and/or title change.
- JOB STATUS:** No entry – leave blank
- TITLE:** Enter employee's new title, if applicable. If title is not changing, leave blank.
- 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.
- JOB CHANGE REASON:** Select the reason for change using the drop down menu. (i.e. Title change – TITLE, receiving a promotion – PROMO, etc.)
- ANNUAL SALARY:** Enter employee's new annual salary, if applicable. If salary is not changing, leave blank.
- 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.
- 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	<input type="text"/>
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	<input type="text"/>
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	<input type="text"/>
Pays:	12	<input type="text"/>

#### 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 entered 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	<input type="text"/>
Employee Status: (Not Enterable)	Active	<input type="text"/>

### 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	<input type="text"/>
Jobs Effective Date: MM/DD/YYYY*	03/01/2018	<input type="text"/>
Personnel Date: MM/DD/YYYY*	03/01/2018	<input type="text"/>
Job Status: (Not Enterable)	Active	<input type="text"/>
Title:	HR Director	<input type="text"/>
FTE: *	1	<input type="text"/>
Job Change Reason: *	PROMO	<input type="text"/>
Annual Salary:	54000	<input type="text"/>
Factor:	12	<input type="text"/>
Pays:	12	<input type="text"/>

### Terminate Job Only, 000376-00 HR Director

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	03/01/2018	<input type="text"/>
Job Status:	Active	<input type="text"/>
Job Change Reason:	PROMO	<input type="text"/>

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].**

- 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.
- 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**
- Apply the appropriate changes to the field if necessary.

- 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.

- 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"

#### 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	4113	61300	0605					.00			
1		10	4071	61100						100			
Total:										.00			

Default from Index **Save and Add New Rows**

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

- 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	4113	61300	0605					.00			<input checked="" type="checkbox"/>
1		10	4071	61100						100			
Total:										.00			

Default from Index **Save and Add New Rows**

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



# 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			<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
										Total:	100.00		

Default from Index    Save and Add New Rows

## 10. Routing Queue

### Academic Affairs

- 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 Academic Termination from DSU, **all EPAFs must have a Chair and Dean level approval.**
- For Academic (Grants) Termination from DSU, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office.** Other approval levels will default.
- EXAMPLE ROUTING QUEUE:**
  - Chair
  - Dean
  - Academic Affairs = Cheryl Ballard (CBALLARD)
  - Provost = Dr. Charles McAdams (CMCADAMS)
  - HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
  - Budget = Crystal Price (CPRICE)
  - Payroll FYI = Charlotte Litton (CLITTON)
  - HR2 = Rachel Becker (RBECKER)
  - HR Director = Lisa Giger (LGIGER)
  - Super = Charlotte Litton (CLITTON)

### Non Academic Affairs:

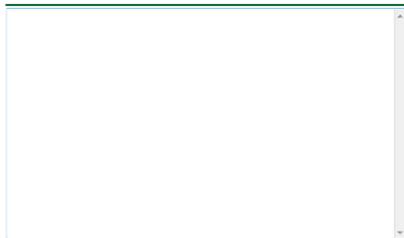
- In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- All EPAFs must have a Director and Vice President level approval.**
- Grants Termination from DSU, **all EPAFS must have a Director,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

Comment

A large, empty rectangular text area with a light gray border and a vertical scrollbar on the right side.

Enter additional  
information here.

Comment

Employee is receiving a temporary promotion until a permanent replacement  
can be hired

EXAMPLE of what a  
comment might  
contain.

## 13. Save EAPF

- 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

## Electronic Personnel Action Form

✓ Your change was saved successfully.  
☐ Enter the information for the EAPF and either Save or Submit

Name and ID:	Rylie Ann Clark, 900137172	Query Date:	Apr 01, 2019
Transaction:	4189		
Transaction Status:	Waiting		
Approval Category:	Title and/or Salary Adjustment (Academic Affairs), D00011		
<input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Delete"/>			

## 14. Submit EAPF

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

## Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

✗ Enter the information for the EPAF and either Save or Submit

**Name and ID:** Rylie Ann Clark, 900137172

**Transaction:** 4010

**Transaction Status:** Pending

**Approval Category:** Termination from DSU (Non Academic Affairs), D00010

**Job and Suffix:** 000376-00, Grants Coordinator

**Query Date:** Jan 31, 2018

**Last Paid Date:**

## 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 1<sup>st</sup> day of the month, then use the first day of the month. See examples below.

#### New EPAF Person Selection

 Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - Indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category:

This employee's title and hourly rate will be changed on March 11, 2019. Enter 03/11/2019 in the query date block.


#### Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	001525	00	Custodian II	4163, Custodial Services	Oct 18, 2018			Active

#### New EPAF Person Selection

 Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - Indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category:

This employee's title and hourly rate will be changed on April 1, 2019. Enter 04/01/2019 in the query date block.

#### Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	001525	00	Custodian II	4163, Custodial Services	Oct 18, 2018			Active

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

Enter an ID, select the link  Not Selected  e Approval Category. Select Go.

\* - indicates a required field.

ID:

Query Date: MM/DD/YYYY

Approval Category:

Employee Job Assignments

Type	Position	Suffix	Title	Status
Primary	001525	00	Custodian	Active

All Jobs

Use EPAFs D00013 and D00014 to change an hourly's employee rate and/or title, and click "GO".

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

#### New EPAF Job Selection

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

ID:

Query Date:

Approval Category:

#### Change Hourly Employee's Current Title and/or Salary, C00023

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/>
<input type="text"/>	Primary	001525	00	Custodian II	4163, Custodial Services	Oct 18, 2018			Active	<input checked="" type="radio"/>

All Jobs

Next Approval Type

Select the employee's primary job by clicking on the radial button and click **GO**.

- 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	<input type="text" value="H1"/>
Employee Status: (Not Enterable) Active		<input type="text" value="A"/>
FT/PT Status:	Full Time	<input type="text" value="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	<input type="text" value="H1"/>
Employee Status: (Not Enterable) Active		<input type="text" value="A"/>
FT/PT Status:	Part Time	<input type="text" value="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	<input type="text"/>
Employee Status: (Not Enterable) Active		<input type="text" value="A"/>
FT/PT Status:	Full Time	<input type="text" value="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.

- JOB BEGIN DATE:** No entry – leave blank
- JOB EFFECTIVE DATE:** Enter the effective date of the hourly rate and/or title change.
- PERSONNEL DATE:** Enter the effective date of the hourly rate and/or title change.
- JOB STATUS:** No entry – leave blank
- TITLE:** Enter employee's new title, if applicable. If title is not changing, leave blank.
- 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.
- 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.)
- 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	<input type="text"/>
Employee Status: (Not Enterable) Active		<input type="text" value="A"/>
FT/PT Status:	Full Time	<input type="text" value="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	<input type="text"/>
Jobs Effective Date: MM/DD/YYYY *	10/18/2018	<input type="text"/>
Personnel Date: MM/DD/YYYY *	10/18/2018	<input type="text"/>
Job Status: (Not Enterable)	Active	<input type="text" value="A"/>
Title:	Custodian II	<input type="text"/>
FTE:	1	<input type="text" value="1"/>
Job Change Reason:		<input type="text" value="Not Selected"/>
Regular Rate:	10	<input type="text"/>

### EXAMPLE 1: Title and Hourly Rate Change

#### Hourly Employee Class

Item	Current Value	New Value
Employee Class Code:	H1, Hourly Eligible for Benefits	<input type="text"/>
Employee Status: (Not Enterable) Active		<input type="text" value="A"/>
FT/PT Status:	Full Time	<input type="text" value="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	<input type="text"/>
Jobs Effective Date: MM/DD/YYYY *	10/18/2018	<input type="text" value="03/11/2019"/>
Personnel Date: MM/DD/YYYY *	10/18/2018	<input type="text" value="03/11/2019"/>
Job Status: (Not Enterable)	Active	<input type="text" value="A"/>
Title:	Custodian II	<input type="text" value="Lead Custodian"/>
FTE:	1	<input type="text" value="1"/>
Job Change Reason:		<input type="text" value="PROMO, Promotion"/>
Regular Rate:	10	<input type="text" value="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



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

- 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.
- 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**
- Apply the appropriate changes to the field if necessary.

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.

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: 04/01/2019

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

Default from Index | Save and Add New Rows

Default from Index | Save and Add New Rows

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"

#### Update Labor Distributions, 001525-00 Custodian II

Current												
Effective Date: 10/18/2018												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override End Date
1		10	4163	62700	0701					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	4163	62700	0701					.00			
		10	4167	62700						100			
Total:										.00			

Default from Index

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

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.

#### Update Labor Distributions, 001525-00 Custodian II

Current												
Effective Date: 10/18/2018												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override End Date
1		10	4163	62700	0701					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	4163	62700	0701					0.00			<input checked="" type="checkbox"/>
1		10	4167	62700						100.00			
Total:										100.00			

Default from Index

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

## Update Labor Distributions, 001525-00 Custodian II

Current												
Effective Date: 10/18/2018												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
1		10	4163	62700	0701					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	4167	62700	0701					100.00			<input type="checkbox"/>
Total:										100.00			

Default from Index    Save and Add New Rows

## 12. Routing Queue

### Academic Affairs

- 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 Academic Termination from DSU, all EPAFs must have a Chair and Dean level approval.
- For Academic (Grants) Termination from DSU, all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office. Other approval levels will default.
- EXAMPLE ROUTING QUEUE:**
  - Chair
  - Dean
  - Academic Affairs = Cheryl Ballard (CBALLARD)
  - Provost = Dr. Charles McAdams (CMCADAMS)
  - HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
  - Budget = Crystal Price (CPRICE)
  - Payroll FYI = Charlotte Litton (CLITTON)
  - HR2 = Rebecca Bouse (RBOUSE)
  - HR Director = Lisa Giger (LGIGER)
  - Super = Charlotte Litton (CLITTON)

### Non Academic Affairs:

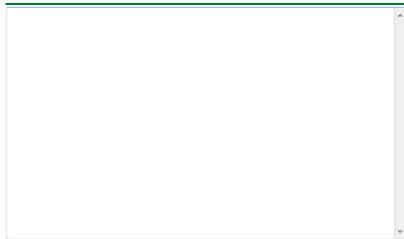
- In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- All EPAFs must have a Director and Vice President level approval.
- Grants Termination from DSU, all EPAFS must have a Director,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

13. Click on the “Save and Add New Rows”.

#### 14. Comments

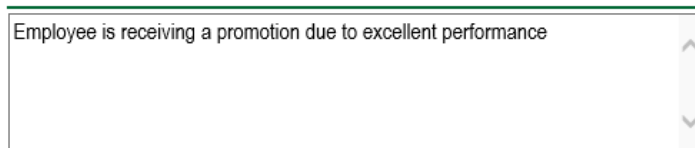
- In the “Comments” section, enter comments for the approvers with an explanation for the action.

Comment

A screenshot of a web form showing an empty text area for entering a comment. The text area is rectangular with a light blue border and a vertical scrollbar on the right side.

EXAMPLE of what a comment might contain.

Comment

A screenshot of a web form showing a text area for entering a comment. The text area contains the example text: "Employee is receiving a promotion due to excellent performance". The text area is rectangular with a light blue border and a vertical scrollbar on the right side.

EXAMPLE of what a comment might contain.

#### 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

#### Electronic Personnel Action Form

✓ Your change was saved successfully.  
Enter the information for the EPAF and either Save or Submit

Name and ID:	MiKayla Peyton Cross, 900137184		
Transaction:	4193	Query Date:	Apr 01, 2019
Transaction Status:	Waiting		
Approval Category:	Hourly Title and/or Rate Adjustment (Non Academic Affairs), D00014		
<input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Delete"/>			

#### 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.

## Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Name and ID: Mikayla Payton Cross, 998137164

Transaction: 4193

Query Date: Apr 01, 2019

Transaction Status: Pending

Approval Category: Hourly Title and/or Rate Adjustment (Non Academic Affairs), D00014

---

## 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.**

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID: 900137172

Rylie Ann Clark



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

Approval Category: Job Labor Distribution Change (Academic Affairs), D00015

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).

#### Employee Job Assignments

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

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

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)

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
Q	New Job									<input checked="" type="radio"/>
	Primary	000376	00	Grants Coordinator	4113, Human Resource	Jan 01, 2017			Active	<input type="radio"/>

All Jobs

Go

- Click on "Go" to begin the Job Labor Distribution Change (Non Academic Affairs) or Job Labor Distribution Change (Academic Affairs)
- 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.
- 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 End Date
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
Q 1		Q 10	Q 4113	Q 61300	Q 0605	Q					100.00	
Q		Q	Q	Q	Q	Q						
Q		Q	Q	Q	Q	Q						
Q		Q	Q	Q	Q	Q						
Q		Q	Q	Q	Q	Q						
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

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

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

New												
Effective Date: MM/DD/YYYY 06/01/2017												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		10	4113	61300	0605					75.00		<input type="checkbox"/>
1		340231	4113	61300	0605					25.00		<input type="checkbox"/>
Total:										100.00		

Default from Index | Save and Add New Rows

New												
Effective Date: MM/DD/YYYY 06/01/2017												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		340231	4113	61300	0605					100.00		<input type="checkbox"/>
Total:										100.00		

Default from Index | Save and Add New Rows

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 = Crystal Price (CPRICE)
  - 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 = Crystal Price (CPRICE)
  - 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

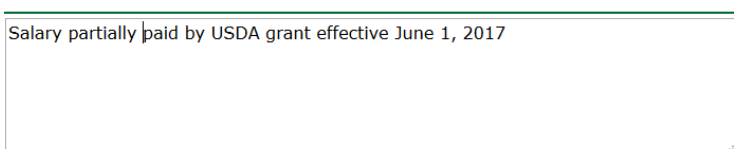
- In the "Comments" section, enter comments for the approvers with an explanation for the action.

Comment



EXAMPLE of what a  
comment might  
contain.

Comment



EXAMPLE of what a  
comment might  
contain.

### 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

## Electronic Personnel Action Form

✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

**Name and ID:** Rylie Ann Clark, 900137172

**Transaction:** 3789

**Transaction Status:** Waiting

**Approval Category:** Job Labor Distribution Change (Non Academic Affairs), D00016

**Job and Suffix:** 000376-00, Grants Coordinator

**Query Date:** Jun 01, 2017

**Last Paid Date:**

[Save](#) [Submit](#) [Delete](#)

### 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.

## Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

**Name and ID:** Rylie Ann Clark, 900137172

**Transaction:** 3790

**Transaction Status:** Pending

**Approval Category:** Job Labor Distribution Change (Non Academic Affairs), D00016

**Job and Suffix:** 000376-00, Grants Coordinator

**Query Date:** Jun 01, 2017

**Last Paid Date:**

## 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.**

#### New EPAF Person Selection

 Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

\* - indicates a required field.

ID: \*   

Query Date: MM/DD/YYYY \*

Approval Category: \*

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).

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)

[Return to EPAF Menu](#)

RELEASE: 8.9.0.3

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

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

- 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.
- Check the circle beside the current campus address and click **NEXT APPROVAL TYPE**.

## Address Selection

To add a new record, choose New Record. Or, choose the record to be updated under Select.

**ID:** Rylie Ann Clark, 900137172  
**Query Date:** Jan 18, 2018  
**Approval Category:** Campus Address Change NAA, D00023

### Terminate Current Campus Address

Type	From and To Date	Address	Status	Select
New Record				<input type="radio"/>
Campus Address	Jan 01, 2015 to Current Date	DSU Box 3232 Broom 136 Campus Cleveland, Mississippi 38732 United States of America	Active	<input checked="" type="radio"/>

Click the circle beside the current campus address and click NEXT APPROVAL TYPE.

✓ Address Type defaulted from Electronic Approval Category Form (NTRACAT).

Show All Addresses

Next Approval Type

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

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

## Address and Telephone Selection

To add a new record, choose New Record. Or, choose the record to be updated under Select.

**ID:** Rylie Ann Clark, 900137172  
**Query Date:** Dec 18, 2017  
**Approval Category:** Campus Address Change NAA, D00023

### Campus Address Add/Change

Type	From and To Date	Address	Primary Telephone	Status	Select
New Record					<input checked="" type="radio"/>
Campus Address	Jan 01, 2015 to Current Date	DSU Box 3232 Broom 136 Campus Cleveland, Mississippi 38732 United States of America	662-8434546	Active	<input type="radio"/>
Permanent/Parent	May 16, 2017 to Current Date	123 Anywhere Street Anywhere, Mississippi 38732 United States of America		Active	<input type="radio"/>

Click the circle beside NEW RECORD and then click GO.

Show All Addresses

Go

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 hyphen is not needed
    - **EXAMPLE: 8464500**

**PLEASE SEE EXAMPLE BELOW.**

#### Terminate Current Campus Address

Item	Current Value	New Value
Address To Date: MM/DD/YYYY*		01/18/2018
Address Type: (Not Enterable)	CA, Campus Address	CA
Address Sequence No.: *	2	2

Enter the end date of the current campus address in the format below

EXAMPLE: 01/18/2018

#### Campus Address Add/Change

Item	Current Value	New Value
Address From Date: MM/DD/YYYY*		01/19/2018
Address Type: *(Not Enterable)		CA
Address Sequence No.:		
Address Line 1: *		DSU Box 3234 Ewing 190
Address Line 2: *		CAMPUS
City: *		CLEVELAND
State: *(Not Enterable)		MS
ZIP or Postal Code: *		38733
County: *		006, Bolivar
Nation: *(Not Enterable)		157
Telephone Type: *(Not Enterable)		CA
Area Code: *		662
Telephone Number: *		8464500

Enter the effective date of the new campus address in the format below

EXAMPLE: 01/19/2018

## 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	Approve
99 - (SUPER) Superuser	LGIGER	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	Approve
90 - (HR) Human Resources	LGIGER	Approve
99 - (SUPER) Superuser	LGIGER	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.

Comment

Enter additional  
information here.

## 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

## Electronic Personnel Action Form

✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

Name and ID:	Rylie Ann Clark, 900137172	Query Date:	Dec 18, 2017
Transaction:	3969	Last Paid Date:	
Transaction Status:	Waiting		
Approval Category:	Campus Address Change (Non Academic Affairs), D00023		
<input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Delete"/>			

## 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.

## Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Name and ID:	Rylie Ann Clark, 900137172	Query Date:	Dec 18, 2017
Transaction:	3969	Last Paid Date:	
Transaction Status:	Pending		
Approval Category:	Campus Address Change (Non Academic Affairs), D00023		

## 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.

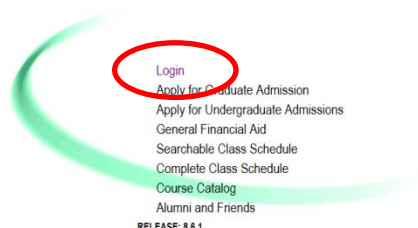
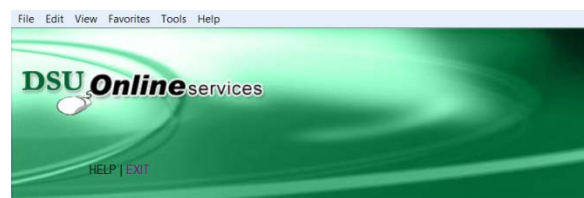
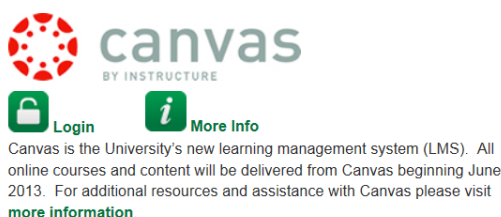
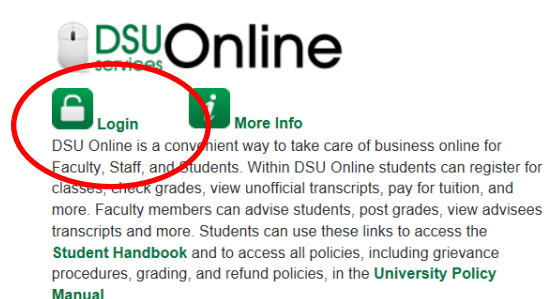
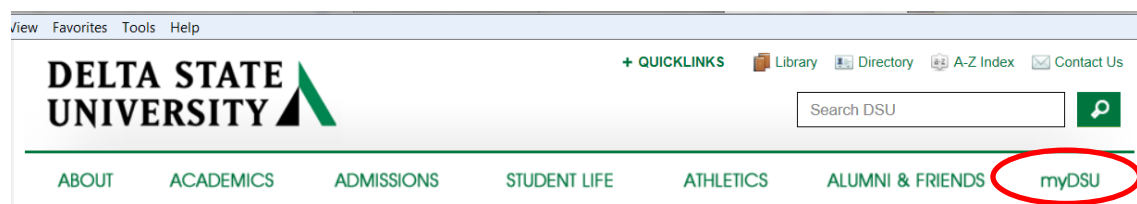
#### Accessing EPAF menu in DSU Online Services

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

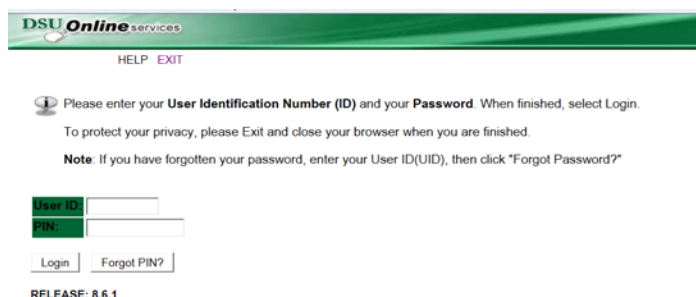
Employee Self Service can be accessed through the DSU website:

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.



DSU Online services

HELP EXIT

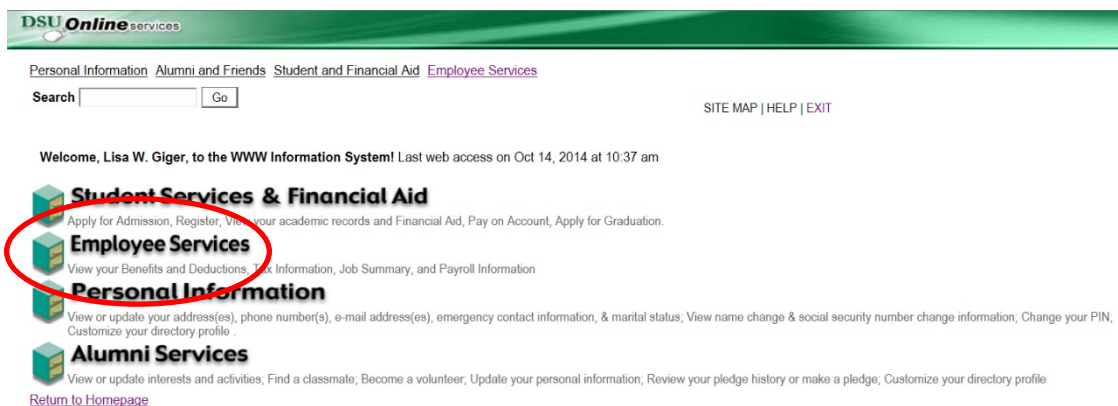
Please enter your **User Identification Number (ID)** and your **Password**. When finished, select Login.  
To protect your privacy, please Exit and close your browser when you are finished.  
**Note:** If you have forgotten your password, enter your User ID(UID), then click "Forgot Password?"

User ID:   
PIN:

Login Forgot PIN?

RELEASE: 8.6.1

6. Click on Employee Services.



DSU Online services

Personal Information Alumni and Friends Student and Financial Aid **Employee Services**

Search  Go SITE MAP | HELP | EXIT

Welcome, Lisa W. Giger, to the WWW Information System! Last web access on Oct 14, 2014 at 10:37 am

**Student Services & Financial Aid**  
Apply for Admission, Register, View your academic records and Financial Aid, Pay on Account, Apply for Graduation.

**Employee Services**  
View your Benefits and Deductions, Tax Information, Job Summary, and Payroll Information

**Personal Information**  
View or update your address(es), phone number(s), e-mail address(es), emergency contact information, & marital status; View name change & social security number change information, Change your PIN, Customize your directory profile

**Alumni Services**  
View or update interests and activities; Find a classmate; Become a volunteer; Update your personal information; Review your pledge history or make a pledge, Customize your directory profile

[Return to Homepage](#)

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.

### Electronic Personnel Action Form

[EPAF Approver Summary](#)  
[EPAF Originator Summary](#)  
[New EPAF](#)  
[EPAF Proxy Records](#)  
[Act as a Proxy](#)  
RELEASE: 8.9

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.

### EPAF Approver Summary

[Current](#) [In My Queue](#) [History](#)

Select the link under Name to access details of the transaction.

Queue Status:

## 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.**

[Current](#) [In My Queue](#) [History](#)

Select the link under Name to access details of the transaction.

Queue Status: All Pending

[New EPAF](#) | [Update Proxies](#) | [Search](#) | [Proxy or Superuser or Filter Transactions](#)

[Return to EPAF Menu](#)

1 - 26 of 31 Next

[Jump to Bottom](#)

**EPAF Transactions**

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

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

1 - 26 of 31 Next

[Jump to Bottom](#)

**EPAF Transactions**

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

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.

## EPAF Approver Summary

[Current](#) [In My Queue](#) [History](#)

✓ 2 transaction(s) processed successfully.

Select the link under Name to access details of the transaction.

Queue Status: All Pending

### 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).**

Select All

Reset

Save

1 - 25 of 31

Next

Jump to Bottom

EPAF Transactions

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	<input type="checkbox"/> <a href="#">Comments</a> <a href="#">Warnings</a>
Donovan, Rylee C.	900114402	48	Campus Address Add/Change - Faculty	Oct 07, 2014	Oct 07, 2014	Approve	<input type="checkbox"/> <a href="#">Comments</a>
Giger, Lisa W. Miscellaneous Position-Fund 25, 004025-00		111	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Nov 01, 2014	Approve	<input type="checkbox"/> <a href="#">Comments</a> <a href="#">Warnings</a>
Giger, Lisa W. HR Workshop III, 004026-00		110	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Oct 20, 2014	Approve	<input type="checkbox"/> <a href="#">Comments</a>
Gunn, Jesse C. PT Instructor / Gen Acad Instr, 000458-00	900114407	81	Adjunct New Hire	Oct 13, 2014	Oct 13, 2014	Approve	<input type="checkbox"/> <b>**Comments</b> <a href="#">Warnings</a>
Hope, Morgan F. Financial Aid Counselor, 000452-00	900114408	143	Terminate Employee Job Only (Academic Affairs)	Oct 27, 2014	Oct 27, 2014	Approve	<input type="checkbox"/> <a href="#">Comments</a>
Hope, Morgan F. Financial Aid Counselor, 000452-00	900114408	86	Employee Termination from DSU (Staff/Hourly)	Oct 16, 2014	Oct 16, 2014	Approve	<input type="checkbox"/> <a href="#">Comments</a>

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.

## EPAF Preview

✓ You are acting as an Approver.

**Name and ID:** Rylee Cassandra Donovan, 900114402

**Transaction:** 54

**Transaction Status:** Pending

**Approval Category:** Salary and Title Change - Staff (Current Position), SALCHS

**Job and Suffix:** 000003-00, Assistant Professor of Art

**Query Date:** Oct 08, 2014

**Last Paid Date:**

Next 🗨

[Approve](#) [Disapprove](#) [Return for Correction](#) [More Info](#) [Add Comment](#)

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.

### Routing Queue

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

### Transaction History

Action	Date	User Name
Created:	Oct 08, 2014	Lisa Weeks Giger
Submitted:	Oct 08, 2014	Lisa Weeks Giger

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

### Routing Queue

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

### Transaction History

Action	Date	User Name
Created:	Oct 08, 2014	Lisa Weeks Giger
Submitted:	Oct 08, 2014	Lisa Weeks Giger

[Approval Types](#) | [Account Distribution](#) | [Errors](#) | [Comments](#) | [Routing Queue](#) | [Transaction History](#)

[Approve](#) [Disapprove](#) [Return for Correction](#) [More Info](#) [Add Comment](#)

Next 🗨

[Return to Top](#)

[EPAF Approver Summary](#)

## 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	08/15/2013	09/01/2014
Personnel Date: *	08/15/2013	08/15/2013	09/01/2014
Title:	Assistant Professor of Art	Assistant Professor of Art	Associate Professor of Art
Annual Salary:	75000	75000.00	
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 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.