ELECTRONIC PERSONNEL ACTION FORMS (EPAFs)

HOW TO GUIDE

OKLAHOMA
PANHANDLE STATE
UNIVERSITY

Effective October 15, 2018
Updated May 22, 2020

APPROVAL CATEGORIES

New Employee – No previous job records / assignments:
   Hourly with No End Date
   Hourly with End Date
   Salaried with End Date
   Salaried with No End Date
   Work Study with No End Date
   Work Study with End Date

Additional Job Record – Employee is being assigned to this job for the first time and already has a job in Banner:
   Hourly with No End Date
   Hourly with End Date
   Salaried with End Date
   Salaried with No End Date
   Work Study with No End Date
   Work Study with End Date

Change a Job Record – A change is needed to a current job record:
   Hourly
   Salaried
   Work Study

Reactivate a Job Record – Employee previously occupied this job:
   Hourly with No End Date
   Hourly with End Date
   Salaried with End Date
   Salaried with No End Date
   Work Study with No End Date
   Work Study with End Date
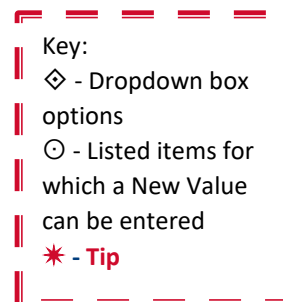
Update Labor Distribution Record

Terminate a Job Record

Terminate a Job Record and Employee

Exception to Normal Pay – Payments to an employee for something other than his/her normal payroll; payment to an employee if EPAF was submitted late and employee should have been paid on a previous payroll and was not; or adjustments to a payroll payment to an employee for a prior month:
   Create New ENP Job
   Reactivate an Existing ENP Job

Transfer – Employee is transferring from one position on campus to another position on campus:
   Transfer to Hourly Job with No End Date
   Transfer to Hourly Job with End Date
   Transfer to a Salaried Job with No End Date
   Transfer to a Salaried Job with End Date
   Transfer to Work Study Job with No End Date

Key:
◇ - Dropdown box options
☉ - Listed items for which a New Value can be entered
✳ - Tip

Appendix:

NEW EMPLOYEE – HOURLY EMPLOYEE WITH NO END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✶ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
4. Select **Approval Category** *New Hourly Employee no end date, NHH1NP*.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✶ **If Employee Job Assignments are listed after clicking on the All Jobs button, STOP. You may have selected the wrong approval category.**
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✶ **The Suffix is a combination of two alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.**
8. Select the radio button for the new job, and click on Go.
9. In the Create/Change PEAEMPL Record section, review the data in the Current Value column. <u>Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate</u>.
   - ☉ **Employee Class Code**
     ✶ **See the list of OPSU Employee Class Codes in Appendix E.**
   - ☉ **Current Hire Date**
     ✶ **The Current Hire Date is the date the employee is to begin working. This should be the same date as the Section 2 Certification date (employee's first date of employment) from page 2 of Form I-9 and the hire date in E-Verify. If an employee begins working prior to the Current Hire Date / I-9 date / E-Verify date, this will result in federal compliance issues.**
   - ☉ **Home Organization**
   - ☉ **Benefit Category**
10. Review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
    ✶ **The Job Begin Date is the date the assignment begins (the first day the employee can start any time entry).**
    ✶ **For new employees, this date should be the same as the Jobs Effective Date.**
11. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
    ✶ **The Jobs Effective Date is the date this action will affect payroll.**
    ✶ **For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.**
12. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
    ✶ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes.**
    ✶ **For all new hires, the Personnel Date should be the same date as the Section 2 Certification date (employee's first date of employment) from page 2 of Form I-9 and the hire date in E-Verify.**
13. Review the **Contract Type** (defaulted to Primary) and use the dropdown box to change if appropriate.
    - ◈ Primary – The employee's primary job.
    - ◈ Secondary – Used to add an additional position for an employee.
    - ◈ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✶ **Each employee can have only one Primary job.**
14. Review the **Job Change Reason** (defaulted to 1NEW, New Hire) and use the dropdown box to change if appropriate.
    ✶ **See the Job Change Reason Codes List in Appendix A for additional information.**

15. Enter the New Value for:
    - ☉ **Regular Rate** – Employee's Pay Rate per Hour.
    - ☉ **FTE** – Full-Time Equivalent. (✺ **Must be 1.0 or less**)
    - ☉ **Hours Per Day** – Number of hours employee will work per day.
    - ☉ **Hours Per Pay** – Number of hours employee will work per pay period.
    - ☉ **Timesheet Organization** – Department timesheet organization number.

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✺ **Hours per day and hours per pay should be based on the FTE.**

16. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.
    ✺ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**
17. If the Contract Type from step 13 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.
    ✺ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**
    ✺ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**
18. **Time Entry Method** – defaults to 'W' Web Time Entry. <u>You must enter 'P' for Monthly Non-Exempt employees paid on the PM payroll (must still be 'W' if paid on PH payroll.</u>
19. Enter the New Value for:
    - ☉ **Title**
20. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
    ✺ **The Effective Date is the date this action will affect payroll.**
21. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
    ✺ **Chart (COA) MUST be P for OPSU.**
    ✺ **Funding total must equal 100%.**
    ✺ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.**
22. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
23. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
24. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
25. Review and then click on the Submit button.
    ✺ **The routing process does not begin until you click on the Save button and then the Submit button.**

NEW EMPLOYEE – HOURLY EMPLOYEE WITH END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
4. Select **Approval Category** *New Hourly Employee With END DATE, NHH1EP*.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✳ **If Employee Job Assignments are listed after clicking on the All Jobs button, STOP. You may have selected the wrong approval category.**
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✳ **The Suffix is a combination of two alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.**
8. Select the radio button for the new job, and click on Go.
9. In the Create/Change PEAEMPL Record section, review the data in the Current Value column. <u>Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate</u>.
   - ⊙ **Employee Class Code**
     ✳ **See the list of OPSU Employee Class Codes in Appendix E.**
   - ⊙ **Current Hire Date**
     ✳ **The Current Hire Date is the date the employee is to begin working. This should be the same date as the Section 2 Certification date (employee's first date of employment) from page 2 of Form I-9 and the hire date in E-Verify. If an employee begins working prior to the Current Hire Date / I-9 date / E-Verify date, this will result in federal compliance issues.**
   - ⊙ **Home Organization**
   - ⊙ **Benefit Category**
10. Review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
    ✳ **The Job Begin Date is the date the assignment begins (the first day the employee can start any time entry).**
    ✳ **For new employees, this date should be the same as the Jobs Effective Date.**
11. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
    ✳ **The Jobs Effective Date is the date this action will affect payroll.**
    ✳ **For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.**
12. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
    ✳ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes.**
    ✳ **For all new hires, the Personnel Date should be the same date as the Section 2 Certification date (employee's first date of employment) from page 2 of Form I-9 and the hire date in E-Verify.**
13. Review the **Contract Type** (defaulted to Primary) and use the dropdown box to change if appropriate.
    - ◇ Primary – The employee's primary job.
    - ◇ Secondary – Used to add an additional position for an employee.
    - ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✳ **Each employee can have only one Primary job.**
14. Review the **Job Change Reason** (defaulted to 1NEW, New Hire) and use the dropdown box to change if appropriate.
    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**

15. Enter the New Value for:
    - ☉ **Regular Rate** – Employee's Pay Rate per Hour.
    - ☉ **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
    - ☉ **Hours Per Day** – Number of hours employee will work per day.
    - ☉ **Hours Per Pay** – Number of hours employee will work per pay period.
    - ☉ **Timesheet Organization** – Department timesheet organization number.

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
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.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

16. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.

    ✳ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**

17. If the Contract Type from step 13 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.

    ✳ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**

    ✳ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**

18. **Time Entry Method –** defaults to 'W' Web Time Entry. <u>You must enter 'P' for Monthly Non-Exempt employees paid on the PM payroll (must still be 'W' if paid on PH payroll.)</u>

19. Enter the New Value for:
    - ☉ **Title**

20. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.

    ✳ **The Effective Date is the date this action will affect payroll.**

21. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.

    ✳ **Chart (COA) MUST be P for OPSU.**

    ✳ **Funding total must equal 100%.**

    ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.**

22. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.

    ✳ **The Jobs Effective Date is the date this action will affect payroll.**

23. Enter the **Personnel Date**.

    ✳ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes.**

24. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.

    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**

25. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.

26. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

27. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

28. Review and then click on the Submit button.

    ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

NEW EMPLOYEE – SALARIED EMPLOYEE WITH END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✶ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
4. Select **Approval Category *New Salaried Employee with END DATE, NHS1EP*.**
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✶ **If Employee Job Assignments are listed after clicking on the All Jobs button, STOP. You may have selected the wrong approval category.**
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✶ **The Suffix is a combination of two alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.**
8. Select the radio button for the new job, and click on Go.
9. In the Create/Change PEAEMPL Record section, review the data in the Current Value column. <u>Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate</u>.
   - ☉ **Employee Class Code**
     ✶ **See the list of OPSU Employee Class Codes in Appendix E.**
   - ☉ **Current Hire Date** (defaulted to Query Date)
     ✶ **The Current Hire Date is the date the employee is to begin working. This should be the same date as the Section 2 Certification date (employee's first date of employment) from page 2 of Form I-9 and the hire date in E-Verify. If an employee begins working prior to the Current Hire Date / I-9 date / E-Verify date, this will result in federal compliance issues.**
   - ☉ **Home Organization**
   - ☉ **Benefit Category**
10. Review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
    ✶ **The Job Begin Date is the date the assignment begins.**
    ✶ **For new employees, this date should be the same as the Jobs Effective Date.**
11. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
    ✶ **The Jobs Effective Date is the date this action will affect payroll.**
    ✶ **For a New Job record, the Jobs Effective Date <u>MUST</u> be the same as the Job Begin Date.**
12. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
    ✶ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes.**
    ✶ **For all new hires, the Personnel Date should be the same date as the Section 2 Certification date (employee's first date of employment) from page 2 of Form I-9 and the hire date in E-Verify.**
13. Review the **Contract Type** (defaulted to Primary) and use the dropdown box to change if appropriate.
    - ◇ Primary – The employee's primary job.
    - ◇ Secondary – Used to add an additional position for an employee.
    - ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✶ **Each employee can have only one Primary job.**
14. Review the **Job Change Reason** (defaulted to 1NEW, New Hire) and use the dropdown box to change if appropriate.
    ✶ **See the Job Change Reason Codes List in Appendix A for additional information.**
15. Enter the new value as appropriate for:

- ☉ **Annual Salary / Contract Amount** – Employee's actual annual salary.
- ☉ **Factor** (defaulted to 12) – Used to calculate the amount per month to be paid.
  - ✳ **Annual Salary (or Contract Amount) / Factor = Monthly Payment**
  - ✳ **As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for staff members.**
- ☉ **Pays** (defaulted to 12) – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)
  - ✳ **For all new hires, Factor = Pays. Payroll Services will update the Pays field if a faculty member completes a deferral agreement.**
  - ✳ **Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.**

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

- ☉ **FTE** (defaulted to 1.0) – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
- ☉ **Hours Per Day** – Number of hours employee will work per day.
- ☉ **Hours Per Pay** – Number of hours employee will work per pay period.
  - ✳ **If the FTE for this employee is not 1.0, the Hours per Day and Hours per Pay (based on the FTE) MUST be entered.**
- ☉ **Timesheet Organization** – Department timesheet organization number.

16. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.
   ✳ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**

17. If the Contract Type from step 13 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.
   ✳ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**
   ✳ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**

18. Enter the New Value for:
   - ☉ **Title**

19. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
   ✳ **The Effective Date is the date this action will affect payroll.**

20. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
   ✳ **Chart (COA) MUST be P for OPSU.**
   ✳ **Funding total must equal 100%.**
   ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.**

21. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.
   ✳ **The Jobs Effective Date is the date this action will affect payroll. Use the termination date – the last day the employee is scheduled to work in this position.**

22. Enter the **Personnel Date**.
   ✳ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes.**

23. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
   ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**

24. Review the **Job Status** (defaulted to Terminated) and use the dropdown box to change if appropriate.
   - ◇ Remove – Do <u>not</u> select Remove as the Job Status field must be populated.

- ◇ Active – Do not select Active for this section of this approval category as this section is used to terminate or end pay for this job record.
- ◇ Leave without Pay, with Benefits
- ◇ Leave without Pay, without Benefits
- ◇ Leave with Pay, with Benefits
- ◇ Leave with Partial Pay, with Benefits – Used for 60% LTD.
- ◇ Terminated
25. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
26. In the Comment box, enter comments with sufficient detail for the approvers to understand the changes to the job record.
27. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
28. Review and then click on the Submit button.
   ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

NEW EMPLOYEE – SALARIED EMPLOYEE WITH NO END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   * ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
4. Select **Approval Category** *New Salaried Employee no End Date, NHS1NP*.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   * ✳ **If Employee Job Assignments are listed after clicking on the All Jobs button, STOP. You may have selected the wrong approval category.**
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   * ✳ **The Suffix is a combination of two alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.**
8. Select the radio button for the new job, and click on Go.
9. In the Create/Change PEAEMPL Record section, review the data in the Current Value column. <u>Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate</u>.
   * ⊙ **Employee Class Code**
     * ✳ **See the list of OPSU Employee Class Codes in Appendix E.**
   * ⊙ **Current Hire Date** (defaulted to Query Date)
     * ✳ **The Current Hire Date is the date the employee is to begin working. This should be the same date as the Section 2 Certification date (employee's first date of employment) from page 2 of Form I-9 and the hire date in E-Verify. If an employee begins working prior to the Current Hire Date / I-9 date / E-Verify date, this will result in federal compliance issues.**
   * ⊙ **Home Organization**
   * ⊙ **Benefit Category**
10. Review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
    * ✳ **The Job Begin Date is the date the assignment begins.**
    * ✳ **For new employees, this date should be the same as the Jobs Effective Date.**
11. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
    * ✳ **The Jobs Effective Date is the date this action will affect payroll.**
    * ✳ **For a New Job record, the Jobs Effective Date <u>MUST</u> be the same as the Job Begin Date.**
12. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
    * ✳ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes.**
    * ✳ **For all new hires, the Personnel Date should be the same date as the Section 2 Certification date (employee's first date of employment) from page 2 of Form I-9 and the hire date in E-Verify.**
13. Review the **Contract Type** (defaulted to Primary) and use the dropdown box to change if appropriate.
    * ◇ Primary – The employee's primary job.
    * ◇ Secondary – Used to add an additional position for an employee.
    * ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    * ✳ **Each employee can have only one Primary job.**
14. Review the **Job Change Reason** (defaulted to 1NEW, New Hire) and use the dropdown box to change if appropriate.
    * ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**
15. Enter the new value as appropriate for:

- ⊙ **Annual Salary / Contract Amount** – Employee's actual annual salary.
- ⊙ **Factor** (defaulted to 12) – Used to calculate the amount per month to be paid.
  - ✳ **Annual Salary (or Contract Amount) / Factor = Monthly Payment**
  - ✳ **As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for staff members.**
- ⊙ **Pays** (defaulted to 12) – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)
  - ✳ **For all new hires, Factor = Pays. Payroll Services will update the Pays field if a faculty member completes a deferral agreement.**
  - ✳ **Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.**
- ⊙ **FTE** (defaulted to 1.0) – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
- ⊙ **Hours Per Day** – Number of hours employee will work per day.
- ⊙ **Hours Per Pay** – Number of hours employee will work per pay period.
  - ✳ **If the FTE for this employee is not 1.0, the Hours per Day and Hours per Pay (based on the FTE) MUST be entered.**

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
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.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

- ⊙ **Timesheet Organization** – Department timesheet organization number.

16. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.
    ✳ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**
17. If the Contract Type from step 13 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.
    ✳ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**
    ✳ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**
18. Enter the New Value for:
    - ⊙ **Title**
19. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
    ✳ **The Effective Date is the date this action will affect payroll.**
20. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
    ✳ **Chart (COA) MUST be P for OPSU.**
    ✳ **Funding total must equal 100%.**
    ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.**
21. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
22. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
23. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
24. Review and then click on the Submit button.
    ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

NEW EMPLOYEE – WORK STUDY WITH NO END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✶ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
4. Select **Approval Category** *New Work Study Employee* ==*with no end date, NHW1NP*==.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✶ **If Employee Job Assignments are listed after clicking on the All Jobs button, STOP. You may have selected the wrong approval category.**
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✶ **The Suffix is a combination of two alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.**
8. Select the radio button for the new job, and click on Go.
9. In the Create/Change PEAEMPL Record section, review the data in the Current Value column. <u>Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate</u>.
   - ☉ **Employee Class Code**
     ✶ **See the list of OPSU Employee Class Codes in Appendix E.**
   - ☉ **Current Hire Date**
     ✶ **The Current Hire Date is the date the employee is to begin working. This should be the same date as the Section 2 Certification date (employee's first date of employment) from page 2 of Form I-9 and the hire date in E-Verify. If an employee begins working prior to the Current Hire Date / I-9 date / E-Verify date, this will result in federal compliance issues.**
   - ☉ **Home Organization**
   - ☉ **Benefit Category**
10. Review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
    ✶ **The Job Begin Date is the date the assignment begins (the first day the employee can start any time entry).**
    ✶ **For new employees, this date should be the same as the Jobs Effective Date.**
11. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
    ✶ **The Jobs Effective Date is the date this action will affect payroll.**
    ✶ **For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.**
12. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
    ✶ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes.**
    ✶ **For all new hires, the Personnel Date should be the same date as the Section 2 Certification date (employee's first date of employment) from page 2 of Form I-9 and the hire date in E-Verify.**
13. Review the **Contract Type** (defaulted to Primary) and use the dropdown box to change if appropriate.
    - ◈ Primary – The employee's primary job.
    - ◈ Secondary – Used to add an additional position for an employee.
    - ◈ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✶ **Each employee can have only one Primary job.**
14. Review the **Job Change Reason** (defaulted to 1NEW, New Hire) and use the dropdown box to change if appropriate.
    ✶ **See the Job Change Reason Codes List in Appendix A for additional information.**

15. Enter the New Value for:
    - ☉ **Regular Rate** – Employee's Pay Rate per Hour.
    - ☉ **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
    - ☉ **Hours Per Day** – Number of hours employee will work per day.
    - ☉ **Hours Per Pay** – Number of hours employee will work per pay period.
    - ☉ **Timesheet Organization** – Department timesheet organization number.
    - ☉ **Title**

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

16. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.

    ✳ **The Effective Date is the date this action will affect payroll.**

17. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.

    ✳ **Chart (COA) MUST be P for OPSU.**

    ✳ **Funding total must equal 100%.**

    ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.**

18. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.

19. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

20. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

21. Review and then click on the Submit button.

    ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
4. Select **Approval Category** *New Work Study Employee* with end date, NHW1NP.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✳ **If Employee Job Assignments are listed after clicking on the All Jobs button, STOP. You may have selected the wrong approval category.**
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✳ **The Suffix is a combination of two alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.**
8. Select the radio button for the new job, and click on Go.
9. In the Create/Change PEAEMPL Record section, review the data in the Current Value column. <u>Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate</u>.
   - ☉ **Employee Class Code**
     - ✳ **See the list of OPSU Employee Class Codes in Appendix E.**
   - ☉ **Current Hire Date**
     - ✳ **The Current Hire Date is the date the employee is to begin working. This should be the same date as the Section 2 Certification date (employee's first date of employment) from page 2 of Form I-9 and the hire date in E-Verify. If an employee begins working prior to the Current Hire Date / I-9 date / E-Verify date, this will result in federal compliance issues.**
   - ☉ **Home Organization**
   - ☉ **Benefit Category**
10. Review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
    ✳ **The Job Begin Date is the date the assignment begins (the first day the employee can start any time entry).**
    ✳ **For new employees, this date should be the same as the Jobs Effective Date.**
11. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
    ✳ **The Jobs Effective Date is the date this action will affect payroll.**
    ✳ **For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.**
12. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
    ✳ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes.**
    ✳ **For all new hires, the Personnel Date should be the same date as the Section 2 Certification date (employee's first date of employment) from page 2 of Form I-9 and the hire date in E-Verify.**
13. Review the **Contract Type** (defaulted to Primary) and use the dropdown box to change if appropriate.
    - ◇ Primary – The employee's primary job.
    - ◇ Secondary – Used to add an additional position for an employee.
    - ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✳ **Each employee can have only one Primary job.**
14. Review the **Job Change Reason** (defaulted to 1NEW, New Hire) and use the dropdown box to change if appropriate.
    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**

15. Enter the New Value for:
    - ⊙ **Regular Rate** – Employee's Pay Rate per Hour.
    - ⊙ **FTE** – Full-Time Equivalent. (�֎ **Must be 1.0 or less**)
    - ⊙ **Hours Per Day** – Number of hours employee will work per day.
    - ⊙ **Hours Per Pay** – Number of hours employee will work per pay period.
    - ⊙ **Timesheet Organization** – Department timesheet organization number.
    - ⊙ **Title**

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

�֎ **Hours per day and hours per pay should be based on the FTE.**

16. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.

    ✶ **The Effective Date is the date this action will affect payroll.**

17. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.

    ✶ **Chart (COA) MUST be P for OPSU.**

    ✶ **Funding total must equal 100%.**

    ✶ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.**

18. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.

    ✶ **The Jobs Effective Date is the date this action will affect payroll.**

19. Enter the **Personnel Date**.

    ✶ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**

20. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.

    ✶ **See the Job Change Reason Codes List in Appendix A for additional information.**

21. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.

22. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

23. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

24. Review and then click on the Submit button.

    ✶ **The routing process does not begin until you click on the Save button and then the Submit button.**

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective) in MM/DD/YYYY format.
4. Select **Approval Category** *Additional Hourly Job no end date, AJH1NP*.
5. Review current assignments under the Employee Job Assignments section.
   ✳ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✳ **If the employee was previously in this position, STOP. Are you reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended? If the answer is YES, continue with the Add a Job Record approval category; however, you must use a new suffix value for the position number. If the answer is NO, use the Reactivate a Job approval category rather than the Add a Job Record approval category.**
   ✳ **Review the Last Paid Date for each job assignments, and make a note of the most recent Last Paid Date for the employee.**
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✳ **The Suffix is a combination of 2 alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.**
   ✳ **If the employee has multiple current jobs in the same position (usually due to multiple rates of pay), start with a Suffix of 00, then use 01, 02, etc.**
   ✳ **If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended (see Step 5 above), use a one up on the Suffix originally used for the primary job you are reactivating (e.g., if the original Suffix used for the position was 00, use 01).**
8. Select the radio button for the new job, and click on Go.
9. Review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Job Begin Date is the date the assignment begins.**
   ✳ **This date should be the same as the Jobs Effective Date.**
10. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date for the employee.**
   ✳ **The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.**
   ✳ **For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.**
11. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   ✳ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
12. Review the **Contract Type** (defaulted to Secondary) and use the dropdown box to change if appropriate.
   ◇ Primary – The employee's primary job.
   ◇ Secondary – Used to add an additional position for an employee.
   ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
   ✳ **Each employee can have only one Primary job.**
13. Review the **Job Change Reason** (defaulted to 1CURR, Concurrent Appointment) and use the dropdown box to change if appropriate.

✷ **See the Job Change Reason Codes List in Appendix A for additional information.**

14. Enter the new value as appropriate for:
    - ⊙ **Regular Rate** – Employee's Pay Rate per Hour.
    - ⊙ **FTE** – Full-Time Equivalent. (✷ **Must be 1.0 or less**)
    - ⊙ **Hours Per Day** – Number of hours employee will work per day.
    - ⊙ **Hours Per Pay** – Number of hours employee will work per pay period.
    - ⊙ **Timesheet Organization** – Department timesheet organization number.

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✷ **Hours per day and hours per pay should be based on the FTE.**

15. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.

    ✷ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**

16. If the Contract Type from step 12 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.

    ✷ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**

    ✷ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**

17. **Time Entry Method** - Defaults to 'W' Web Time Entry. <u>You must enter 'P' for Monthly Non-Exempt employees paid on the PM payroll (must still be 'W' if paid on PH payroll).</u>

18. Enter the New Value for:
    - ⊙ **Title**

19. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.

    ✷ **The Effective Date is the date this action will affect payroll.**

20. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.

    ✷ **Chart (COA) MUST be P for OPSU.**

    ✷ **Funding total must equal 100.**

    ✷ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**

21. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.

22. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

23. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

24. Review and then click on the Submit button.

    ✷ **The routing process does not begin until you click on the Save button and then the Submit button.**

ADD A JOB RECORD – HOURLY EMPLOYEE WITH END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective) in MM/DD/YYYY format.
4. Select **Approval Category** *Additional Hourly Job with END DATE, AJH1EP*.
5. Review current assignments under the Employee Job Assignments section.
   ✳ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✳ **If the employee was previously in this position, STOP. Are you reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended? If the answer is YES, continue with the Add a Job Record approval category; however, you must use a new suffix value for the position number. If the answer is NO, use the Reactivate a Job approval category rather than the Add a Job Record approval category.**
   ✳ **Review the Last Paid Date for each job assignments, and make a note of the most recent Last Paid Date for the employee.**
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✳ **The Suffix is a combination of 2 alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.**
   ✳ **If the employee has multiple current jobs in the same position (usually due to multiple rates of pay), start with a Suffix of 00, then use 01, 02, etc.**
   ✳ **If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended (see Step 5 above), use a one up on the Suffix originally used for the primary job you are reactivating (e.g., if the original Suffix used for the position was 00, use 01).**
8. Select the radio button for the new job, and click on Go.
9. Review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Job Begin Date is the date the assignment begins.**
   ✳ **This date should be the same as the Jobs Effective Date.**
10. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
    ✳ **The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date for the employee.**
    ✳ **The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.**
    ✳ **For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.**
11. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
    ✳ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
12. Review the **Contract Type** (defaulted to Secondary) and use the dropdown box to change if appropriate.
    ◇ Primary – The employee's primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✳ **Each employee can have only one Primary job.**
13. Review the **Job Change Reason** (defaulted to 1CURR, Concurrent Appointment) and use the dropdown box to change if appropriate.

✳ **See the Job Change Reason Codes List in Appendix A for additional information.**

14. Enter the new value as appropriate for:
    ⊙ **Regular Rate** – Employee's Pay Rate per Hour.
    ⊙ **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
    ⊙ **Hours Per Day** – Number of hours employee will work per day.
    ⊙ **Hours Per Pay** – Number of hours employee will work per pay period.
    ⊙ **Timesheet Organization** – Department timesheet organization number.

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

15. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.
    ✳ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**

16. If the Contract Type from step 12 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.
    ✳ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**
    ✳ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**

17. <mark>Defaults to 'W' Web Time Entry. You must enter 'P for Monthly Non-Exempt employees paid on the PM payroll (must still be 'W' if paid on PH payroll.</mark>

18. Enter the New Value for
    ⊙ **Title**

19. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
    ✳ **The Effective Date is the date this action will affect payroll.**

20. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
    ✳ **Chart (COA) MUST be P for OPSU.**
    ✳ **Funding total must equal 100.**
    ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**

21. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.
    ✳ **The Jobs Effective Date is the date this action will affect payroll.**

22. Enter the **Personnel Date**.
    ✳ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes.**

23. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**

24. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.

25. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

26. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

27. Review and then click on the Submit button.
    ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

ADD A JOB RECORD – SALARIED EMPLOYEE WITH END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective) in MM/DD/YYYY format.
4. Select **Approval Category** *Additional Salaried Job with END DATE, AJS1EP*.
5. Review current assignments under the Employee Job Assignments section.
   ✳ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✳ **If the employee was previously in this position, STOP. Are you reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended? If the answer is YES, continue with the Add a Job Record approval category; however, you must use a new suffix value for the position number. If the answer is NO, use the Reactivate a Job approval category rather than the Add a Job Record approval category.**
   ✳ **Review the Last Paid Date for each job assignments, and make a note of the most recent Last Paid Date for the employee.**
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✳ **The Suffix is a combination of 2 alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.**
   ✳ **If the employee has multiple current jobs in the same position (usually due to multiple rates of pay), start with a Suffix of 00, then use 01, 02, etc.**
   ✳ **If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended (see Step 5 above), use a one up on the Suffix originally used for the primary job you are reactivating (e.g., if the original Suffix used for the position was 00, use 01).**
8. Select the radio button for the new job, and click on Go.
9. Review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Job Begin Date is the date the assignment begins. This date should be the same as the Jobs Effective Date.**
10. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
    ✳ **The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date.**
    ✳ **The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.**
    ✳ **For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.**
11. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
    ✳ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
12. Review the **Contract Type** (defaulted to Overload) and use the dropdown box to change if appropriate.
    ◇ Primary – The employee's primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✳ **Each employee can have only one Primary job.**
13. Review the **Job Status** (defaulted to Active) and use the dropdown box to change if appropriate.
    ◇ Remove – Do not select Remove as the Job Status field must be populated.

- ◇ Active
- ◇ Leave without Pay, with Benefits
- ◇ Leave without Pay, without Benefits
- ◇ Leave with Pay, with Benefits
- ◇ Leave with Partial Pay, with Benefits – Used for 60% LTD.
- ◇ Terminated – Do not select Terminated in the Additional Salaried Job section.

14. Select the **Job Change Reason** (defaulted to 1CURR, Concurrent Appointment) from the dropdown box.
    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**

15. Enter the new value as appropriate for:
    - ☉ **Annual Salary / Contract Amount** – Employee's actual annual salary.
    - ☉ **Factor** – Used to calculate the amount per month to be paid.
      ✳ **Annual Salary (or Contract Amount) / Factor = Monthly Payment**
      ✳ **As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for staff members.**
    - ☉ **Pays** – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)
      ✳ **Payroll Services will update the Pays field if a faculty member completes a deferral agreement.**
      ✳ **Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.**
    - ☉ **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
    - ☉ **Hours Per Day** – Number of hours employee will work per day.
    - ☉ **Hours Per Pay** – Number of hours employee will work per pay period.
      ✳ **If the FTE for this employee is not 1.0, the Hours per Day and Hours per Pay (based on the FTE) MUST be entered.**
    - ☉ **Timesheet Organization** – Department timesheet organization number.

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

16. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.
    ✳ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**

17. If the Contract Type from step 12 is Secondary or Overload AND the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.
    ✳ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**
    ✳ **If the Contract Type for this job is Primary, do NOT select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**

18. Leave Report Method (defaults to P – Payroll entry -- so that no leave report will be produced for the extra job.) Change to W if you wish a leave report to be presented in Employee Self-Service for this job

19. Enter the New Value for:
    - ☉ **Title**

20. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
    ✳ **The Effective Date is the date this action will affect payroll.**

21. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
    ✳ **Chart (COA) MUST be P for OPSU.**
    ✳ **Funding total must equal 100%.**
    ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A**

remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.

22. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.
    ✴ **The Jobs Effective Date is the date this action will affect payroll.   Use the termination date – the last day the employee is scheduled to work in this position.**

23. Enter the **Personnel Date**.
    ✴ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**

24. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
    ✴ **See the Job Change Reason Codes List in Appendix A for additional information.**

25. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.

26. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

27. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

28. Review and then click on the Submit button.
    ✴ **The routing process does not begin until you click on the Save button and then the Submit button.**

ADD A JOB RECORD – SALARIED EMPLOYEE WITH NO END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✶ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
4. Select **Approval Category** *Additional Salaried Job no end date, AJS1NP*.
5. Review current assignments under the Employee Job Assignments section.
   ✶ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✶ **If the employee was previously in this position, STOP. Are you reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended? If the answer is YES, continue with the Add a Job Record approval category; however, you must use a new suffix value for the position number. If the answer is NO, use the Reactivate a Job approval category rather than the Add a Job Record approval category.**
   ✶ **Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.**
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✶ **The Suffix is a combination of 2 alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.**
   ✶ **If the employee has multiple current jobs in the same position (usually due to multiple rates of pay), start with a Suffix of 00, then use 01, 02, etc.**
   ✶ **If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended (see Step 5 above), use a one up on the Suffix originally used for the primary job you are reactivating (e.g., if the original Suffix used for the position was 00, use 01).**
8. Select the radio button for the new job, and click on Go.
9. Review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
   ✶ **The Job Begin Date is the date the assignment begins. This date should be the same as the Jobs Effective Date.**
10. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
    ✶ **The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date.**
    ✶ **The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.**
    ✶ **For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.**
11. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
    ✶ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
12. Use the dropdown box to select the **Contract Type** (defaulted to Overload).
    ◇ Primary – The employee's primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✶ **Each employee can have only one Primary job.**
13. Select the **Job Status** (defaulted to Active) and use the dropdown box to change if appropriate.
    ◇ Remove – Do not select Remove as the Job Status field must be populated.

- ◇ Active
- ◇ Leave without Pay, with Benefits
- ◇ Leave without Pay, without Benefits
- ◇ Leave with Pay, with Benefits
- ◇ Leave with Partial Pay, with Benefits – Used for 60% LTD.
- ◇ Terminated – Do <u>not</u> select Terminated for this approval category. Use a termination approval category.

14. Select the **Job Change Reason** (defaulted to 1CURR, Current Appointment) from the dropdown box.
    ✴ **See the Job Change Reason Codes List in Appendix A for additional information.**

15. Enter the new value as appropriate for:
    - ☉ **Annual Salary / Contract Amount** – Employee's actual annual salary.
    - ☉ **Factor** – Used to calculate the amount per month to be paid.
        ✴ **Annual Salary (or Contract Amount) / Factor = Monthly Payment**
        ✴ **As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for staff members.**
    - ☉ **Pays** – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)
        ✴ **Payroll Services will update the Pays field if a faculty member completes a deferral agreement.**
        ✴ **Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.**

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✴ **Hours per day and hours per pay should be based on the FTE.**

- ☉ **FTE** – Full-Time Equivalent. (✴ **Must be 1.0 or less**)
- ☉ **Hours Per Day** – Number of hours employee will work per day.
- ☉ **Hours Per Pay** – Number of hours employee will work per pay period.
    ✴ **If the FTE for this employee is not 1.0, the Hours per Day and Hours per Pay (based on the FTE) <u>MUST</u> be entered.**
- ☉ **Timesheet Organization** – Department timesheet organization number.

16. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.
    ✴ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**

17. If the Contract Type from step 12 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.
    ✴ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**
    ✴ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**

18. Leave Report Method (defaults to P – Payroll entry -- so that no leave report will be produced for the extra job.) Change to W if you wish a leave report to be presented in Employee Self-Service for this job.

19. Enter the New Value for:
    - ☉ **Title**

20. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
    ✴ **The Effective Date is the date this action will affect payroll.**

21. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
    ✴ **Chart (COA) MUST be P for OPSU.**
    ✴ **Funding total must equal 100%.**
    ✴ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**

22. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
23. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
24. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
25. Review and then click on the Submit button.
   ✸ **The routing process does not begin until you click on the Save button and then the Submit button.**

ADD A JOB RECORD – WORK STUDY WITH NO END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
4. Select **Approval Category** *Additional Work Study Job* <mark>with no end date, AJW1NP</mark>.
5. Review current assignments under the Employee Job Assignments section.
   ✳ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✳ **If the employee was previously in this position, STOP. Are you reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended? If the answer is YES, continue with the Add a Job Record approval category; however, you must use a new suffix value for the position number. If the answer is NO, use the Reactivate a Job approval category rather than the Add a Job Record approval category.**
   ✳ **Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.**
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✳ **The Suffix is a combination of 2 alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.**
   ✳ **If the employee has multiple current jobs in the same position (usually due to multiple rates of pay), start with a Suffix of 00, then use 01, 02, etc.**
   ✳ **If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended (see Step 5 above), use a one up on the Suffix originally used for the primary job you are reactivating (e.g., if the original Suffix used for the position was 00, use 01).**
8. Select the radio button for the new job, and click on Go.
9. Review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Job Begin Date is the date the assignment begins.**
   ✳ **This date should be the same as the Jobs Effective Date.**
10. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date for the employee.**
   ✳ **The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.**
   ✳ **For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.**
11. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   ✳ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
12. Review the **Contract Type** (defaulted to Secondary) and use the dropdown box to change if appropriate.
   ◇ Primary – The employee's primary job.
   ◇ Secondary – Used to add an additional position for an employee.
   ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
   ✳ **Each employee can have only one Primary job.**
13. Select the **Job Change Reason** (defaulted to 1CURR, Concurrent Appointment) from the dropdown box.

✳ **See the Job Change Reason Codes List in Appendix A for additional information.**

14. Enter the new value as appropriate for:
    - ☉ **Regular Rate** – Employee's Pay Rate per Hour.
    - ☉ **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
    - ☉ **Hours Per Day** – Number of hours employee will work per day.
    - ☉ **Hours Per Pay** – Number of hours employee will work per pay period.
    - ☉ **Timesheet Organization** – Department timesheet organization number.
    - ☉ **Title**

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

15. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.

    ✳ **The Effective Date is the date this action will affect payroll.**

16. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.

    ✳ **Chart (COA) MUST be P for OPSU.**

    ✳ **Funding total must equal 100%.**

    ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**

17. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.

18. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

19. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

20. Review and then click on the Submit button.

    ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

ADD A JOB RECORD – WORK STUDY WITH END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✴ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
4. Select **Approval Category** *Additional Work Study Job* **with end date, AJW1NP**.
5. Review current assignments under the Employee Job Assignments section.
   ✴ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✴ **If the employee was previously in this position, STOP. Are you reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended? If the answer is YES, continue with the Add a Job Record approval category; however, you must use a new suffix value for the position number. If the answer is NO, use the Reactivate a Job approval category rather than the Add a Job Record approval category.**
   ✴ **Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.**
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✴ **The Suffix is a combination of 2 alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.**
   ✴ **If the employee has multiple current jobs in the same position (usually due to multiple rates of pay), start with a Suffix of 00, then use 01, 02, etc.**
   ✴ **If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended (see Step 5 above), use a one up on the Suffix originally used for the primary job you are reactivating (e.g., if the original Suffix used for the position was 00, use 01).**
8. Select the radio button for the new job, and click on Go.
9. Review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
   ✴ **The Job Begin Date is the date the assignment begins.**
   ✴ **This date should be the same as the Jobs Effective Date.**
10. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
    ✴ **The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date for the employee.**
    ✴ **The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.**
    ✴ **For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.**
11. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
    ✴ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
12. Review the **Contract Type** (defaulted to Secondary) and use the dropdown box to change if appropriate.
    ◇ Primary – The employee's primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✴ **Each employee can have only one Primary job.**
13. Select the **Job Change Reason** (defaulted to 1CURR, Concurrent Appointment) from the dropdown box.

✳ **See the Job Change Reason Codes List in Appendix A for additional information.**

14. Enter the new value as appropriate for:

	Hours/	Hours/
FTE	Day	Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

- ⊙ **Regular Rate** – Employee's Pay Rate per Hour.
- ⊙ **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
- ⊙ **Hours Per Day** – Number of hours employee will work per day.
- ⊙ **Hours Per Pay** – Number of hours employee will work per pay period.
- ⊙ **Timesheet Organization** – Department timesheet organization number.
- ⊙ **Title**

15. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.

✳ **The Effective Date is the date this action will affect payroll.**

16. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.

✳ **Chart (COA) MUST be P for OPSU.**

✳ **Funding total must equal 100%.**

✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**

17. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.

✳ **The Jobs Effective Date is the date this action will affect payroll.**

18. Enter the **Personnel Date**.

✳ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**

19. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.

✳ **See the Job Change Reason Codes List in Appendix A for additional information.**

20. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.

21. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

22. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

23. Review and then click on the Submit button.

✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

CHANGE A JOB RECORD – HOURLY EMPLOYEE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
    ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective) in MM/DD/YYYY format.
4. Select **Approval Category *Change Existing Hourly Job, CJH1NP*.**
5. Review current assignments under the Employee Job Assignments section.
    ✳ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
    ✳ **Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.**
6. Click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
    ✳ **The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date.**
    ✳ **The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status). If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.**
9. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
    ✳ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes.**
10. Review the **Contract Type** current value and use the dropdown box to change if appropriate.
    ◇ Primary – The employee's primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✳ **Each employee can have only one Primary job.**
11. Review **Job Status** current value and use the dropdown box to change if appropriate.
    ◇ Remove – Do <u>not</u> select Remove as the Job Status field must be populated.
    ◇ Active
    ◇ Leave without Pay, with Benefits
    ◇ Leave without Pay, without Benefits
    ◇ Leave with Pay, with Benefits
    ◇ Leave with Partial Pay, with Benefits
    ◇ Terminated – Do <u>not</u> select Terminated for this approval category. Use a termination approval category.
12. Select the **Job Change Reason** from the dropdown box.
    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**
13. Review the current values and enter the new value for any changes to:
    a. **Regular Rate** – Employee's Pay Rate per Hour.
    b. **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
    c. **Hours Per Day** – Number of hours employee will work per day.
    d. **Hours Per Pay** – Number of hours employee will work per pay period.
        ✳ **If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.**
    e. **Timesheet Organization** – Department timesheet organization number.

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

14. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.

✺ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**

15. If the Contract Type from step 10 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.

✺ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**

✺ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**

16. Enter the New Value for:
     ⊙ **Title**

17. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.

✺ **The Effective Date is the date this action will affect payroll.**

18. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.

✺ **Chart (COA) MUST be P for OPSU.**

✺ **Funding total must equal 100%.**

✺ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**

19. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.

20. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

21. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

22. Review and then click on the Submit button.

✺ **The routing process does not begin until you click on the Save button and then the Submit button.**

CHANGE A JOB RECORD – SALARIED EMPLOYEE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✴ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective) in MM/DD/YYYY format.
4. Select **Approval Category** *Change Existing Salaried Job, CJS1NP*.
5. Review current assignments under the Employee Job Assignments section.
   ✴ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✴ **Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.**
6. Click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   ✴ **The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date.**
   ✴ **The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status). If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.**
9. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   ✴ **This date does** not **affect pay and serves as an information field for historical, audit, or reporting purposes.**
10. Review the **Contract Type** current value and use the dropdown box to change if appropriate.
    ◇ Primary – The employee's primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✴ **Each employee can have only one Primary job.**
11. Review **Job Status** current value and use the dropdown box to change if appropriate.
    ◇ Remove – Do not select Remove as the Job Status field must be populated.
    ◇ Active
    ◇ Leave without Pay, with Benefits
    ◇ Leave without Pay, without Benefits
    ◇ Leave with Pay, with Benefits
    ◇ Leave with Partial Pay, with Benefits – Used for 60% LTD.
    ◇ Terminated – Do not select Terminated for this approval category. Use a termination approval category.
12. Select the **Job Change Reason** from the dropdown box.
    ✴ **See the Job Change Reason Codes List in Appendix A for additional information.**
13. Review the current values and enter the new value for any changes to:
    ⊙ **Annual Salary / Contract Amount** – Employee's actual annual salary.
    ⊙ **Factor** – Used to calculate the amount per month to be paid.
       ✴ **Annual Salary (or Contract Amount) / Factor = Monthly Payment**
       ✴ **As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for staff members.**
    ⊙ **Pays** – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)
       ✴ **Payroll Services will update the Pays field if a faculty member completes a deferral agreement.**
       ✴ **Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.**

- ⊙ **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
- ⊙ **Hours Per Day** – Number of hours employee will work per day.
- ⊙ **Hours Per Pay** – Number of hours employee will work per pay period.
  - ✳ **If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.**
- ⊙ **Timesheet Organization** – Department timesheet organization number.

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

14. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.
    ✳ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**
15. If the Contract Type from step 10 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.
    ✳ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**
    ✳ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**
16. **Leave Report Method**. Enter a value ONLY if the leave report method is changing. Enter 'W' if you wish a leave report to be presented in Employee Self-Service for this job. Enter 'P' if you wish no leave report to be presented in Employee Self-Service for this job.
17. Enter the New Value for:
    - ⊙ **Title**
18. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
    ✳ **The Effective Date is the date this action will affect payroll.**
19. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.
    ✳ **Chart (COA) MUST be P for OPSU.**
    ✳ **Funding total must equal 100%.**
    ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**
20. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
21. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
22. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
23. Review and then click on the Submit button.
    ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

CHANGE A JOB RECORD – WORK STUDY

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective) in MM/DD/YYYY format.
4. Select **Approval Category** *Change Existing Work Study Job, CJW1NP*.
5. Review current assignments under the Employee Job Assignments section.
   ✳ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee**.
   ✳ **Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.**
6. Click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date.**
   ✳ **The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status). If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.**
9. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   ✳ **This date does** not **affect pay and serves as an information field for historical, audit, or reporting purposes.**
10. Review the **Contract Type** current value and use the dropdown box to change if appropriate.
    ◇ Primary – The employee's primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
11. Review **Job Status** current value and use the dropdown box to change if appropriate.
    ◇ Remove – Do not select Remove as the Job Status field must be populated.
    ◇ Active
    ◇ Leave without Pay, with Benefits
    ◇ Leave without Pay, without Benefits
    ◇ Leave with Pay, with Benefits
    ◇ Leave with Partial Pay, with Benefits
    ◇ Terminated – Do not select Terminated for this approval category. Use a termination approval category.
    ✳ **Each employee can have only one Primary job.**
12. Select the **Job Change Reason** from the dropdown box.
    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**
13. Review the current values and enter the new value for any changes to:
    ⊙ **Regular Rate** – Employee's Pay Rate per Hour.
    ⊙ **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
    ⊙ **Hours Per Day** – Number of hours employee will work per day.
    ⊙ **Hours Per Pay** – Number of hours employee will work per pay period.
    ✳ **If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.**
    ⊙ **Timesheet Organization** – Department timesheet organization number.
    ⊙ **Title**

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

14. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
    ✴ **The Effective Date is the date this action will affect payroll.**
15. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.
    ✴ **Chart (COA) MUST be P for OPSU.**
    ✴ **Funding total must equal 100%.**
    ✴ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**
16. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
17. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
18. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
19. Review and then click on the Submit button.
    ✴ **The routing process does not begin until you click on the Save button and then the Submit button.**

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✶ **Use % as the wildcard for searches.**
3. Enter the **Query Date** in MM/DD/YYYY format.
   ✶ **When reactivating a previous job, you may query using an earlier date when that previous job was active. This will allow you to select the previous job. Remember to change the Jobs Effective Date, Personnel Date, and Funding Effective Date as appropriate as the query date will have auto-populated those fields.**
4. Select **Approval Category** *Reactivate Existing Hourly Job no end date, RJH1NP*.
5. Review current assignments under the Employee Job Assignments section.
   ✶ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee**.
   ✶ **If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended, STOP. Use an Add a New Job approval category and use a new suffix value for the position number.**
   ✶ **Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.**
6. If you have determined you are using the correct approval category, click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   ✶ **The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date for the employee.**
   ✶ **The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.**
9. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   ✶ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
10. Review the **Contract Type** current value and use the dropdown box to change if appropriate.
    ◇ Primary – The employee's primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✶ **Each employee can have only one Primary job.**
11. Select the **Job Change Reason** from the dropdown box.
    ✶ **See the Job Change Reason Codes List in Appendix A for additional information**.
12. Review the current values and enter the new value for any changes to:
    ☉ **Regular Rate** – Employee's Pay Rate per Hour.
    ☉ **FTE** – Full-Time Equivalent. (✶ **Must be 1.0 or less**)
    ☉ **Hours Per Day** – Number of hours employee will work per day.
    ☉ **Hours Per Pay** – Number of hours employee will work per pay period.
    ✶ **If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.**
    ☉ **Timesheet Organization** – Department timesheet organization number.

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✶ **Hours per day and hours per pay should be based on the FTE.**

13. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.
    ✳ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**
14. If the Contract Type from step 10 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.
    ✳ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**
    ✳ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**
15. Enter the New Value for:
    ⊙ **Title**
16. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
    ✳ **The Effective Date is the date this action will affect payroll.**
17. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.
    ✳ **Chart (COA) MUST be P for OPSU.**
    ✳ **Funding total must equal 100%.**
    ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**
18. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
19. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
20. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
21. Review and then click on the Submit button.
    ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

REACTIVATE A JOB RECORD – HOURLY EMPLOYEE WITH END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** in MM/DD/YYYY format.
   ✳ **When reactivating a previous job, you may query using an earlier date when that previous job was active. This will allow you to select the previous job. Remember to change the Jobs Effective Date, Personnel Date, and Funding Effective Date as appropriate as the query date will have auto-populated those fields.**
4. Select **Approval Category** *Reactivate Existing Hourly Job with END DATE, RJH1EP*.
5. Review current assignments under the Employee Job Assignments section.
   ✳ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✳ **If you are reactivating a** primary **job and there have been subsequent primary jobs since the original primary job was ended,** STOP**. Use an Add a New Job approval category and use a new suffix value for the position number.**
   ✳ **Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.**
6. If you have determined you are using the correct approval category, click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date for the employee.**
   ✳ **The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.**
9. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   ✳ **This date does** not **affect pay and serves as an information field for historical, audit, or reporting purposes.**
10. Review the **Contract Type** current value and use the dropdown box to change if appropriate.
    ◇ Primary – The employee's primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✳ **Each employee can have only one Primary job.**
11. Review **Job Status** (defaulted to Active) and use the dropdown box to change if appropriate.
    ◇ Remove – Do not select Remove as the Job Status field must be populated.
    ◇ Active
    ◇ Leave without Pay, with Benefits
    ◇ Leave without Pay, without Benefits
    ◇ Leave with Pay, with Benefits
    ◇ Leave with Partial Pay, with Benefits – Used for 60% LTD.
    ◇ Terminated – Do not select Terminated in this section.
12. Select the **Job Change Reason** from the dropdown box.
    ✳ **See the Job Change Reason Codes List in Appendix A for additional information**.
13. Review the current values and enter the new value for any changes to:

	Hours/	Hours/
FTE	Day	Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

- ⊙ **Regular Rate** – Employee's Pay Rate per Hour.
- ⊙ **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
- ⊙ **Hours Per Day** – Number of hours employee will work per day.
- ⊙ **Hours Per Pay** – Number of hours employee will work per pay period.
    - ✳ **If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.**
- ⊙ **Timesheet Organization** – Department timesheet organization number.

14. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.
    - ✳ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**

15. If the Contract Type from step 10 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.
    - ✳ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**
    - ✳ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**

16. Enter the New Value for:
    - ⊙ **Title**

17. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
    - ✳ **The Effective Date is the date this action will affect payroll.**

18. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.
    - ✳ **Chart (COA) MUST be P for OPSU.**
    - ✳ **Funding total must equal 100%.**
    - ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**

19. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.
    - ✳ **The Jobs Effective Date is the date this action will affect payroll.**

20. Enter the **Personnel Date**.
    - ✳ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes.**

21. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
    - ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**

22. Review **Job Status** (defaulted to Terminated) and use the dropdown box to change if appropriate.
    - ◇ Remove – Do <u>not</u> select Remove as the Job Status field must be populated.
    - ◇ Active – Do <u>not</u> select Active in this section.
    - ◇ Leave without Pay, with Benefits
    - ◇ Leave without Pay, without Benefits
    - ◇ Leave with Pay, with Benefits
    - ◇ Leave with Partial Pay, with Benefits – Used for 60% LTD.
    - ◇ Terminated

23. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.

24. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

25. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

26. Review and then click on the Submit button.
   ✴ **The routing process does not begin until you click on the Save button and then the Submit button.**

REACTIVATE A JOB RECORD – SALARIED EMPLOYEE WITH END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** in MM/DD/YYYY format.
   ✳ **When reactivating a previous job, you may query using an earlier date when that previous job was active. This will allow you to select the previous job. Remember to change the Jobs Effective Date, Personnel Date, and Funding Effective Date as appropriate as the query date will have auto-populated those fields.**
4. Select **Approval Category** *Reactivate Existing Salaried Job with END DATE, RJS1EP*.
5. Review current assignments under the Employee Job Assignments section.
   ✳ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✳ **If you are reactivating a** primary **job and there have been subsequent primary jobs since the original primary job was ended, STOP. Use an Add a New Job approval category and use a new suffix value for the position number.**
   ✳ **Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.**
6. If you have determined you are using the correct approval category, click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date.**
   ✳ **The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.**
9. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   ✳ **This date does** not **affect pay and serves as an information field for historical, audit, or reporting purposes.**
10. Review the **Contract Type** current value and use the dropdown box to change if appropriate.
    ◇ Primary – The employee's primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.)
    ✳ **Each employee can have only one Primary job.**
11. Review **Job Status** (defaulted to Active) and use the dropdown box to change if appropriate.
    ◇ Remove – Do not select Remove as the Job Status field must be populated.
    ◇ Active
    ◇ Leave without Pay, with Benefits
    ◇ Leave without Pay, without Benefits
    ◇ Leave with Pay, with Benefits
    ◇ Leave with Partial Pay, with Benefits – Used for 60% LTD.
    ◇ Terminated – Do not select Terminated in this section.
12. Select the **Job Change Reason** from the dropdown box.
    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**
13. Review the current values and enter the new value for any changes to:
    ☉ **Annual Salary / Contract Amount** – Employee's actual annual salary.

- ☉ **Factor** – Used to calculate the amount per month to be paid.
  - ✳ **Annual Salary (or Contract Amount) / Factor = Monthly Payment**
  - ✳ **As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for staff members.**
- ☉ **Pays** – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)
  - ✳ **Payroll Services will update the Pays field if a faculty member completes a deferral agreement.**
  - ✳ **Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.**
- ☉ **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
- ☉ **Hours Per Day** – Number of hours employee will work per day.
- ☉ **Hours Per Pay** – Number of hours employee will work per pay period.
  - ✳ **If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.**
- ☉ **Timesheet Organization** – Department timesheet organization number.

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

14. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.
    - ✳ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**

15. If the Contract Type from step 10 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.
    - ✳ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**
    - ✳ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**

16. Enter the New Value for:
    - ☉ **Title**

17. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
    - ✳ **The Effective Date is the date this action will affect payroll.**

18. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.
    - ✳ **Chart (COA) MUST be P for OPSU.**
    - ✳ **Funding total must equal 100%.**
    - ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**

19. In the Terminate Job Record Only section, enter the **Jobs Effective Date**.
    - ✳ **The Jobs Effective Date is the date this action will affect payroll. Use the termination date – the last day the employee is scheduled to work in this position.**

20. Enter the **Personnel Date**.
    - ✳ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes.**

21. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
    - ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**

22. Review **Job Status** (defaulted to Terminated) and use the dropdown box to change if appropriate.
    - ◇ Remove – Do <u>not</u> select Remove as the Job Status field must be populated.
    - ◇ Active – Do <u>not</u> select Active in this section.

- ◇ Leave without Pay, with Benefits
- ◇ Leave without Pay, without Benefits
- ◇ Leave with Pay, with Benefits
- ◇ Leave with Partial Pay, with Benefits – Used for 60% LTD.
- ◇ Terminated

23. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.

24. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

25. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

26. Review and then click on the Submit button.

✴ **The routing process does not begin until you click on the Save button and then the Submit button.**

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use the % as the wildcard for searches.**
3. Enter the **Query Date** in MM/DD/YYYY format.
   ✳ **When reactivating a previous job, you may query using an earlier date when that previous job was active. This will allow you to select the previous job. Remember to change the Jobs Effective Date, Personnel Date, and Funding Effective Date as appropriate as the query date will have auto-populated those fields.**
4. Select **Approval Category** *Reactivate Existing Salaried Job no end date, RJS1NP*.
5. Review current assignments under the Employee Job Assignments section.
   ✳ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee**.
   ✳ **If you are reactivating a** primary **job and there have been subsequent primary jobs since the original primary job was ended, STOP. Use an Add a New Job approval category and use a new suffix value for the position number.**
   ✳ **Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.**
6. If you have determined you are using the correct approval category, click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date.**
   ✳ **The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.**
9. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   ✳ **This date does** not **affect pay and serves as an information field for historical, audit, or reporting purposes.**
10. Review the **Contract Type** current value and use the dropdown box to change if appropriate.
    ◇ Primary – The employee's primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.)
    ✳ **Each employee can have only one Primary job.**
11. Review **Job Status** (defaulted to Active) and use the dropdown box to change if appropriate.
    ◇ Remove – Do not select Remove as the Job Status field must be populated.
    ◇ Active
    ◇ Leave without Pay, with Benefits
    ◇ Leave without Pay, without Benefits
    ◇ Leave with Pay, with Benefits
    ◇ Leave with Partial Pay, with Benefits – Used for 60% LTD.
    ◇ Terminated – Do not select Terminated for this approval category. Use a termination approval category.
12. Select the **Job Change Reason** from the dropdown box.
    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**
13. Review the current values and enter the new value for any changes to:
    ☉ **Annual Salary / Contract Amount** – Employee's actual annual salary.

- ☉ **Factor** – Used to calculate the amount per month to be paid.
  - ✳ **Annual Salary (or Contract Amount) / Factor = Monthly Payment**
  - ✳ **As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for staff members.**
- ☉ **Pays** – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)
  - ✳ **Payroll Services will update the Pays field if a faculty member completes a deferral agreement.**
  - ✳ **Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.**
- ☉ **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
- ☉ **Hours Per Day** – Number of hours employee will work per day.
- ☉ **Hours Per Pay** – Number of hours employee will work per pay period.
  - ✳ **If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.**
- ☉ **Timesheet Organization** – Department timesheet organization number.

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

14. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.
    ✳ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**

15. If the Contract Type from step 10 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.
    ✳ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**
    ✳ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**

16. Enter the New Value for:
    - ☉ **Title**

17. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
    ✳ **The Effective Date is the date this action will affect payroll.**

18. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.
    ✳ **Chart (COA) MUST be P for OPSU.**
    ✳ **Funding total must equal 100%.**
    ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**

19. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.

20. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

21. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

22. Review and then click on the Submit button.
    ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

REACTIVATE A JOB RECORD – WORK STUDY WITH NO END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** in MM/DD/YYYY format.
   ✳ **When reactivating a previous job, you may query using an earlier date when that previous job was active. This will allow you to select the previous job. Remember to change the Jobs Effective Date, Personnel Date, and Funding Effective Date as appropriate as the query date will have auto-populated those fields.**
4. Select **Approval Category** *Reactivate Existing Work Study Job* with no end date, RJW1NP.
5. Review current assignments under the Employee Job Assignments section.
   ✳ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✳ **If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended, STOP. Use an Add a New Job approval category and use a new suffix value for the position number.**
   ✳ **Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.**
6. If you have determined you are using the correct approval category, click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date for the employee.**
   ✳ **The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.**
9. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   ✳ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
10. Review the **Contract Type** current value and use the dropdown box to change if appropriate.
    ◇ Primary – The employee's primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✳ **Each employee can have only one Primary job.**
11. Select the **Job Change Reason** from the dropdown box.
    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**
12. Review the current values and enter the new value for any changes to:
    ☉ **Regular Rate** – Employee's Pay Rate per Hour.
    ☉ **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
    ☉ **Hours Per Day** – Number of hours employee will work per day.
    ☉ **Hours Per Pay** – Number of hours employee will work per pay period.
    ✳ **If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.**
    ☉ **Timesheet Organization** – Department timesheet organization number.
    ☉ **Title**

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

13. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
   ✳ **The Effective Date is the date this action will affect payroll.**
14. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.
   ✳ **Chart (COA) MUST be P for OPSU.**
   ✳ **Funding total must equal 100%.**
   ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**
15. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
16. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
17. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
18. Review and then click on the Submit button.
   ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

REACTIVATE A JOB RECORD – WORK STUDY WITH END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** in MM/DD/YYYY format.
   ✳ **When reactivating a previous job, you may query using an earlier date when that previous job was active. This will allow you to select the previous job. Remember to change the Jobs Effective Date, Personnel Date, and Funding Effective Date as appropriate as the query date will have auto-populated those fields.**
4. Select **Approval Category** *Reactivate Existing Work Study Job* <mark>with end date, RJW1NP</mark>.
5. Review current assignments under the Employee Job Assignments section.
   ✳ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✳ **If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended, STOP. Use an Add a New Job approval category and use a new suffix value for the position number.**
   ✳ **Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.**
6. If you have determined you are using the correct approval category, click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date for the employee.**
   ✳ **The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.**
9. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   ✳ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
10. Review the **Contract Type** current value and use the dropdown box to change if appropriate.
    ◇ Primary – The employee's primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✳ **Each employee can have only one Primary job.**
11. Select the **Job Change Reason** from the dropdown box.
    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**
12. Review the current values and enter the new value for any changes to:
    ☉ **Regular Rate** – Employee's Pay Rate per Hour.
    ☉ **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
    ☉ **Hours Per Day** – Number of hours employee will work per day.
    ☉ **Hours Per Pay** – Number of hours employee will work per pay period.
    ✳ **If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.**
    ☉ **Timesheet Organization** – Department timesheet organization number.
    ☉ **Title**

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

13. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
    ✶ **The Effective Date is the date this action will affect payroll.**
14. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.
    ✶ **Chart (COA) MUST be P for OPSU.**
    ✶ **Funding total must equal 100%.**
    ✶ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**
15. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.
    ✶ **The Jobs Effective Date is the date this action will affect payroll.**
16. Enter the **Personnel Date**.
    ✶ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes.**
17. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
    ✶ **See the Job Change Reason Codes List in Appendix A for additional information.**
18. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
19. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
20. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
21. Review and then click on the Submit button.
    ✶ **The routing process does not begin until you click on the Save button and then the Submit button.**

UPDATE LABOR DISTRIBUTION RECORD

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✴ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
4. Select **Approval Category *Labor Distribution Update for Existing Job, LAB1P***.
5. Review current assignments under the Employee Job Assignments section.
   ✴ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
6. Click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
   ✴ **The Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date. (The Last Paid Date is listed in the Update Labor Distribution Information heading for this section.)**
9. Review current funding and update funding in the New section (defaulted to the current value).
   ✴ **Chart (COA) MUST be P for OPSU.**
   ✴ **Funding total must equal 100%.**
   ✴ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**
10. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
11. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
12. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
13. Review and then click on the Submit button.
    ✴ **The routing process does not begin until you click on the Save button and then the Submit button.**

TERMINATE A JOB RECORD

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
4. Select **Approval Category** *Terminate – Job Record Only, TRM1JP*.
   ✳ **When preparing an EPAF for an employee who is retiring, select this approval category – do NOT select Terminate a Job Record and Employee.**
5. Review current assignments under the Employee Job Assignments section.
   ✳ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
6. Click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Jobs Effective Date is the date this action will affect payroll. This should be the actual last day of work and can be the Last Paid Date or later. (The Last Paid Date is listed in the top section of the EPAF screen – under Query Date and to the right of Transaction Status.)**
   ✳ **If the employee's last day of work is prior to the Last Paid Date, use the Last Paid Date as the Jobs Effective Date, and enter the actual last day of work as the Personnel Date.**
9. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   ✳ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
10. Select the **Job Change Reason** from the dropdown box.
    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**
11. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
12. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
13. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
14. Review and then click on the Submit button.
    ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

TERMINATE A JOB RECORD AND EMPLOYEE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
4. Select **Approval Category** *Terminate – Job Record and Employee, TRM1EP*.
   ✳ **Do NOT select this approval category for an employee who is retiring – use Terminate Job Record Only, TRM1JP.**
5. Review current assignments under the Employee Job Assignments section.
   ✳ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✳ **If an employee has at least one other active assignment in addition to his/her Primary job, STOP. Use the Terminate a Job Record approval category to terminate all job records other than the Primary job record. Then use the Terminate a Job Record and Employee approval category to terminate the Primary job record and the employee.**
6. Click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. In the Terminate/End Pay Job Record Only, review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Jobs Effective Date is the date this action will affect payroll. This should be the actual last day of work and can be the Last Paid Date or later. (The Last Paid Date is listed in the top section of the EPAF screen – under Query Date and to the right of Transaction Status.)**
   ✳ **If the employee's last day of work is prior to the last Paid Date, use the Last Paid Date as the Jobs Effective Date, and enter the actual last day of work as the Personnel Date.**
9. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   ✳ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
10. Select the **Job Change Reason** from the dropdown box.
    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**
11. In the Terminate Employee section, select the **Term Reason Code** from the dropdown box.
12. Enter the **Termination Date**.
    ✳ **The Termination Date is normally the last work date.**
    ✳ **The Termination Date cannot be earlier than the Jobs Effective Date entered in the Terminate/End Pay Job Record section. If the last day of the pay period or the Last Paid Date is used for the Jobs Effective Date, enter that same date for the Termination Date.**
13. Review the **Last Work Date** (defaulted to Query Date) and change if appropriate.
    ✳ **The Last Work Date is the last day the employee is expected to work and will normally be the same as the Termination Date.**
14. Review the **Employee Status** (defaulted to T, Terminated) and change if appropriate.
    ✳ **If the Termination Date is a future date, change the Employee Status to Active. When the payroll is processed for the period that includes the Termination Date, the employee status will automatically be set to Terminated.**
15. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
16. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
17. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
18. Review and then click on the Submit button.
    ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
   ✳ **Review the Monthly Payroll Processing Schedule, determine which pay period the ENP will be paid (regular monthly or supplemental), and enter the first day of the month of the payroll on which the ENP will be paid. (For example, if the ENP will be paid on the August regular monthly payroll or August supplemental payroll, you MUST enter 08/01/YYYY.)**
   ✳ **The regular monthly payroll will pay on the last day of the month and the supplemental payroll will pay on the 12th of the following month, unless the 12th is a non-working day. (For example, the August monthly payroll will pay on 08/31/YYYY, and the August supplemental payroll will pay on 09/12/YYYY. For both the August monthly payroll and August supplemental payroll, you MUST enter 08/01/YYYY.)**

Pay Period	Leave Reports Due by 10:00am	Leave Approvals Due by 12:00pm	EPAFs Ready to Apply by 5:00pm	Paper ENP's Due in Payroll	Final Payroll in CORE	Regular Payday	Supp'l Payday
HUMAN RESOURCES/PAYROLL SERVICES							
MONTHLY PAYROLL PROCESSING SCHEDULE							
July 2017 - Dec 2017							
June Supp				6/29/2017	7/5/2017		7/12/2017
July	7/17/2017	7/17/2017	7/14/2017	7/17/2017	7/21/2017	7/31/2017	
July Supp				8/1/2017	8/4/2017		8/11/2017
Aug	8/16/2017	8/16/2017	8/15/2017	8/16/2017	8/24/2017	8/31/2017	
Aug Supp			8/29/2017	8/30/2017	9/5/2017		9/12/2017
Sept	9/18/2017	9/18/2017	9/15/2017	9/15/2017	9/22/2017	9/29/2017	
Sept Supp			9/29/2017	10/2/2017	10/4/2017		10/12/2017

   See Appendix C for more information on dates to be used for this approval category.
   ✳ **If the ENP is being used to process an overpayment (or a negative amount), do NOT use an ENP EPAF. Contact Dana Collins for the ENP form to be completed and attach the appropriate documentation.**
4. Select *Exception to Normal Pay Create New Job, ENPN1P*.
   ✳ **This approval category can only be used for a salaried exempt employee.**
   ✳ **If the ENP is related to retroactive pay for a non-exempt employee, do NOT use an ENP EPAF. Contact Dana Collins for the ENP form to be completed and attach the appropriate documentation so time, leave, and any overtime/comp time adjustments are properly addressed.**
5. Review current assignments under the Employee Job Assignments section.
   ✳ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
6. Click on Go.
7. Enter the Position and Suffix for the ENP.
   ✳ **Use the Position the ENP applies to and enter a new Suffix beginning with the letter "Z" followed by a number. (Start with Z0 and go up to Z9 if needed.)**
   ✳ **If the ENP applies to a Position for which the job record has previously been terminated and that Position has not been canceled, do NOT reactivate the job record. The ENP EPAF can be processed using that position number and the new Suffix beginning with the letter "Z" followed by a number.**
8. Select the radio button for the New Job, and click on Go.
9. Review the **Job Begin Date** (defaulted to Query Date).
   ✳ **The Job Begin Date MUST be the first day of the month of the payroll on which the ENP will be processed.**

✳ **This date should be the same as the Jobs Effective Date.**

10. Review the **Jobs Effective Date** (defaulted to Query Date).

    ✳ **The Jobs Effective Date MUST be the first day of the month of the payroll on which the ENP will be processed.**

    ✳ **The Jobs Effective Date MUST be the same as the Job Begin Date.**

11. Review the **Personnel Date** (defaulted to Query Date).

    ✳ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**

12. Select the **Job Change Reason** from the dropdown box.

    ✳ **Job Change Reason codes to be used for this approval category begin with ENP.**

    ✳ **Select one of the Job Change Reason Codes from the list below. (This chart is also found in Appendix B.)**

Job Change Reason		Earnings Code		Use / Additional Information & Notes
Code	Description	Code	Description	
ENPSP	Special Projects	130	Extra Time Pay	**Extra work; grading papers; special short-term projects**
ENPRP	Retroactive Pay	A10	Regular Monthly Adj	**EPAF was late and employee was not paid; adjustment to a payment received in a prior month**
ENPIN	Incentive Pay	081	Approved Incentive Plans	**Certificate Programs (e.g., Ambassador Program, Leadership Program)**
ENPAW	Awards	080	Awards	**Award for Excellence; Outstanding Staff Award; published paper**
ENPMV	Moving Allowance	515	Moving Allowance	**Salary additive for moving expenses for new faculty/staff**

13. Review the **Payroll ID** (defaulted to PM, OPSU Monthly) and use the dropdown box to change if appropriate.

    ✳ **Select "PM, OPSU Monthly" for the regular monthly payroll or "PX, OPSU Supplemental" for the supplemental payroll. (Only select PM or PX – do NOT select any of the other Payroll IDs listed.)**

14. Enter the **Timesheet Organization** for which the payment is associated with.

15. Complete the Exception to Normal Pay Payment Information section:

    ☉ **Effective Date** (defaulted to Query Date) – The date this action will affect payroll.

    ✳ **The Effective Date MUST be the first day of the month of the payroll on which the ENP will be processed. This date MUST be the same date as the Job Begin Date and Jobs Effective Date above.**

    ☉ **Earnings Code** – Select the appropriate Earnings Code from the dropdown box.

    ✳ **Only certain Earnings Codes can be used for this approval category. Others will result in an error message.**

    ✳ **See the ENP Job Change Reason Codes and Earnings Codes Chart in Step 12 above and select the Earnings Code that corresponds with the Job Change Reason selected.**

    ☉ **Hours or Units Per Pay**

    ✳ **Enter the number "1".**

    ☉ **Deemed Hours** – Leave this field blank.

    ☉ **Special Rate** – The total amount the employee is to be paid.

    ☉ **Shift** – Defaulted to 1. Do not change this field.

    ☉ **End Date**

    ✳ **The End Date MUST be the first day of the following month.   (For example, if the ENP will be paid on the August regular monthly payroll or August supplemental payroll, you MUST enter 09/01/YYYY.)**

16. Review the **Effective Date** (defaulted to Query Date) for the funding information.

    ✳ **The Effective Date is the date this action will affect payroll.**

17. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.

    ✳ **Chart (COA) MUST be P for OPSU.**

    ✳ **Funding total must equal 100%.**

✴ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**

18. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.

    ✴ **The Jobs Effective Date is the date this action will affect payroll.   This date <u>MUST</u> be the last day of the month of the payroll on which the ENP will be processed. (For example, if the Job Begin Date is 08/01/YYYY, this date <u>MUST</u> be 08/31/YYYY.)**

19. Enter the **Personnel Date**.

    ✴ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes. Use the same date as the Jobs Effective Date.**

20. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.

21. In the Comment box, enter comments with sufficient detail for the approvers to understand the ENP being processed.

22. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

23. Review and then click on the Submit button.

    ✴ **The routing process does not begin until you click on the Save button and then the Submit button.**

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✷ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
   ✷ **Review the Monthly Payroll Processing Schedule, determine which pay period the ENP will be paid (regular monthly or supplemental), and enter the first day of the month of the payroll on which the ENP will be paid. (For example, if the ENP will be paid on the August regular monthly payroll or August supplemental payroll, you MUST enter 08/01/YYYY.)**
   ✷ **The regular monthly payroll will pay on the last day of the month and the supplemental payroll will pay on the 12th of the following month, unless the 12th is a non-working day. (For example, the August monthly payroll will pay on 08/31/YYYY, and the August supplemental payroll will pay on 09/12/YYYY. For both the August monthly payroll and August supplemental payroll, you MUST enter 08/01/YYYY.)**

HUMAN RESOURCES/PAYROLL SERVICES
MONTHLY PAYROLL PROCESSING SCHEDULE
July 2017 - Dec 2017

Pay Period	Leave Reports Due by 10:00am	Leave Approvals Due by 12:00pm	EPAFs Ready to Apply by 5:00pm	Paper ENP's Due in Payroll	Final Payroll in CORE	Regular Payday	Supp'l Payday
June Supp				6/29/2017	7/5/2017		7/12/2017
July	7/17/2017	7/17/2017	7/14/2017	7/17/2017	7/21/2017	7/31/2017	
July Supp				8/1/2017	8/4/2017		8/11/2017
Aug	8/16/2017	8/16/2017	8/15/2017	8/16/2017	8/24/2017	8/31/2017	
Aug Supp			8/29/2017	8/30/2017	9/5/2017		9/12/2017
Sept	9/18/2017	9/18/2017	9/15/2017	9/15/2017	9/22/2017	9/29/2017	
Sept Supp			9/29/2017	10/2/2017	10/4/2017		10/12/2017

See Appendix C for more information on dates to be used for this approval category.
✷ **If the ENP is being used to process an overpayment (or a negative amount), do NOT use an ENP EPAF. Contact Dana Collins for the ENP form to be completed and attach the appropriate documentation.**

4. Select *Exception to Normal Pay Reactivate Existing ENP Job, ENPR1P*.
   ✷ **This approval category can only be used for a salaried exempt employee.**
   ✷ **If the ENP is related to retroactive pay for a non-exempt employee, do NOT use an ENP EPAF. Contact Dana Collins for the ENP form to be completed and attach the appropriate documentation so time, leave, and any overtime/comp time adjustments are properly addressed.**
5. Review current assignments under the Employee Job Assignments section.
   ✷ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✷ **If the employee does not have an assignment with the Position for which the ENP applies with a Suffix beginning with the letter "Z" followed by a number, STOP. You may have selected the wrong approval category.**
6. If you have determined you are using the correct approval category, click on Go.
7. Select the radio button for the existing ENP job to be reactivated, and click on Go.
   ✷ **An ENP that can be reactivated will have a Suffix that begins with the letter "Z" followed by a number.**
8. Review the **Jobs Effective Date** (defaulted to Query Date).
   ✷ **The Jobs Effective Date MUST be the first day of the month of the payroll on which the ENP will be processed.**
9. Review the **Personnel Date** (defaulted to Query Date).

✷ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**

10. Select the **Job Change Reason** from the dropdown box.
    ✷ **Job Change Reason codes to be used for this approval category begin with ENP.**
    ✷ **Select one of the Job Change Reason Codes from the list below. (This chart is also found in Appendix B.)**

Job Change Reason		Earnings Code		Use / Additional Information & Notes
Code	Description	Code	Description	
ENPSP	Special Projects	130	Extra Time Pay	**Extra work; grading papers; special short-term projects**
ENPRP	Retroactive Pay	A10	Regular Monthly Adj	**EPAF was late and employee was not paid; adjustment to a payment received in a prior month**
ENPIN	Incentive Pay	081	Approved Incentive Plans	**Certificate Programs (e.g., Ambassador Program, Leadership Program)**
ENPAW	Awards	080	Awards	**Award for Excellence; Outstanding Staff Award; published paper**
ENPMV	Moving Allowance	515	Moving Allowance	**Salary additive for moving expenses for new faculty/staff**

11. Review the **Payroll ID** (defaulted to PM, OPSU Monthly) and use the dropdown box to change if appropriate.
    ✷ **Select "PM, OPSU Monthly" for the regular monthly payroll or "PX, OPSU Supplemental" for the supplemental payroll. (Only select PM or PX – do NOT select any of the other Payroll IDs listed.)**
12. Enter the **Timesheet Organization** for which the payment is associated with.
13. Complete the Exception to Normal Pay Payment Information section:
    ☉ **Effective Date** (defaulted to Query Date) – The date this action will affect payroll.
      ✷ **The Effective Date MUST be the first day of the month of the payroll on which the ENP will be processed. This date MUST be the same date as the Jobs Effective Date above.**
    ☉ **Earnings Code** – Select the appropriate Earnings Code from the dropdown box.
      ✷ **Only certain Earnings Codes can be used for this approval category. Others will result in an error message.**
      ✷ **See the ENP Job Change Reason Codes and Earnings Codes Chart in Step 10 above and select the Earnings Code that corresponds with the Job Change Reason selected.**
      ✷ **The Earnings Code is defaulted to a Regular Monthly Earnings Code; however, this will not result in regular pay as the job is defaulted to a zero rate. Only the additional Earnings Codes will result in payment.**
    ☉ **Hours or Units Per Pay** (defaulted to 162.50 if FTE = 1.0)
      ✷ **Enter the number "1".**
    ☉ **Deemed Hours** – Leave this field blank.
    ☉ **Special Rate** – The total amount the employee is to be paid.
    ☉ **Shift** – Defaulted to 1. Do not change this field.
    ☉ **End Date**
      ✷ **The End Date MUST be the first day of the following month.   (For example, if the ENP will be paid on the August regular monthly payroll or August supplemental payroll, you MUST enter 09/01/YYYY.)**
14. Review the **Effective Date** (defaulted to Query Date) for the funding information.
    ✷ **The Effective Date is the date this action will affect payroll.**
15. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
    ✷ **Chart (COA) MUST be P for OPSU.**
    ✷ **Funding total must equal 100%.**
    ✷ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**

16. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.
    ✳ **The Jobs Effective Date is the date this action will affect payroll.   This date <u>MUST</u> be the last day of the month of the payroll on which the ENP will be processed. (For example, if the Job Begin Date is 08/01/YYYY, this date <u>MUST</u> be 08/31/YYYY.)**
17. Enter the **Personnel Date**.
    ✳ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes. Use the same date as the Jobs Effective Date.**
18. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
19. In the Comment box, enter comments with sufficient detail for the approvers to understand the ENP being processed.
20. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
21. Review and then click on the Submit button.
    ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✴ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
   ✴ **Enter the date the employee is to begin the NEW job (the job the employee is transferring to).**
4. Select **Approval Category** *Transfer to Hourly Job no end date, TRH1NP*.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✴ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✴ **Only one position can be ended with a Transfer approval category. If the employee has multiple jobs that need to be ended, use the approval category Terminate – Job Record Only, TRM1JP to end all jobs, with the exception of one (1) job. Then, use the Transfer approval category for the final job.**
   ✴ **Two (2) consecutive terminate dates are NOT allowed on a job record. If the employee is transferring from a position with an End Date (a Jobs Effective Date has been entered to Terminate/End Pay for the Job Record), contact Payroll Services to request that End Date be removed. After that date is removed, the Transfer EPAF can be processed.**
6. Click on Go.
7. Select the radio button for the position the employee is transferring from.
   ✴ **Note the heading for the box that contains the job information is labeled Terminate/End Pay Job Record Only. This indicates the job selected is the one that is being terminated.**
8. Click on **Next Approval Type**.
   ✴ **Do NOT select Go at this time. Selecting Go will result in the employee being transferred to the same job the employee is transferring from.**
9. Enter the Position number and Suffix for the job the employee is transferring to.
   ✴ **Note the heading for the box that contains the job information is labeled Transfer to Hourly Job. This indicates the job selected is the one the employee is transferring to.**
   ✴ **For the suffix, follow the same rules you would for a new hire or to add a new job (e.g., begin with the suffix 00.)**
10. Click on **Go**.
    ✴ **Do NOT select Next Approval Type a second time.**
11. Note the sections on the EPAF form.
    ✴ **The data in the Terminate/End Pay Job Record Only section is for the job the employee is transferring from.**
    ✴ **The data in the other sections (Transfer Employment Data, Transfer to Hourly Job, and Update Labor Distribution Information) is for the job the employee is transferring to.**
12. In the Terminate/End Pay Job Record Only section, enter the **Jobs Effective Date**.
    ✴ **The Jobs Effective Date is the last day the employee will be working in the job the employee is transferring from. This will normally be the day before the employee transfers to the new job; however, this date can be any date prior to the effective date of the new job (the job the employee is transferring to) and greater than or equal to the Last Paid Date of the prior job.**
    ✴ **If the dates overlap on the job the employee is transferring from and the job the employee is transferring to, STOP. The overlap of dates will result in a problem if the Contract Type for job the employee is transferring from is Primary and the job the employee is transferring to is Primary. If both are Primary, use the appropriate Change Job EPAF (Hourly, Salaried, or Work Study) to change the Contract Type from Primary to Secondary for the job the employee is transferring from. After the Change Job EPAF has been applied (not just submitted or approved), the Transfer EPAF can be used to complete the needed transfer.**
13. Enter the **Personnel Date** for the position the employee is transferring from.

✸ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**

14. Select the **Job Change Reason** from the dropdown box.

✸ **See the Job Change Reason Codes List in Appendix A for additional information.**

✸ **In many cases, the Job Change Reason Code for the job the employee is transferring from should match the Job Change Reason Code for the job the employee is transferring to (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).**

15. In the Transfer Employment Data section, review the data in the Current Value column. <u>Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate based on the job the employee is transferring to</u>.

⊙ **Employee Status** (defaulted to Active)

⊙ **Employee Class Code**

✸ **See the list of OPSU Employee Class Codes in Appendix E.**

⊙ **Home Organization**

⊙ **Distribution Organization**

✸ **The Distribution Organization code should be the same as the Home Organization.**

⊙ **Benefit Category** (defaulted to JE, All Deds/Bens – Used for trans)

✸ **If the employee is transferring to a job with the same Benefit Category as the job the employee is transferring from (e.g., transferring from a 1.0 FTE hourly job to another 1.0 FTE hourly job), select the same category from the dropdown box as the category listed in the Current Value column. Otherwise, leave the New Value as JE, All Ded/Bens – Used for trans.**

✸ **If the Benefit Category is changing, the Benefit Category in the New Value column MUST be JE, All Deds/Bens – Used for trans. Current benefit deductions must be ended before the new deductions can be created. JE is a temporary transitional rule that will allow the Transfer EPAF to process and allow HR Benefits to review and make the appropriate changes.**

✸ **If there is an increase or decrease to the employee's FTE between the job the employee is transferring from and the job the employee is transferring to, leave the Benefit Category as JE, All Deds/Bens – Used for trans.**

16. In the Transfer to Hourly Job section, review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.

✸ **The Job Begin Date is the date the assignment begins (the first day the employee can start any time entry) for the job the employee is transferring to.**

✸ **This date should be the same as the Jobs Effective Date.**

✸ **There is one exception where the Job Begin Date will not be the same as the Jobs Effective Date. If the employee was previously in this position, is the employee transferring back to an existing position and the position suffix value used is the same as what was used for the prior job for this employee? If yes, the Job Begin Date must be the same as the original Job Begin Date (as the field cannot be changed on an existing job).**

17. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.

✸ **The Jobs Effective Date is the date this action will affect payroll.**

✸ **The Jobs Effective Date MUST be the same as the Job Begin Date. The only exception is when an employee was previously in this position and is transferring back to the position using the same position suffix value. See Step 16.**

18. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.

✸ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**

19. Review the **Contract Type** (defaulted to Primary) and use the dropdown box to change if appropriate.

◇ Primary – The employee's primary job.

◇ Secondary – Used to add an additional position for an employee.

◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).

✳ **Each employee can have only one Primary job.**

20. Review the **Job Status** (defaulted to Active) and use the dropdown box to change if appropriate.
    ◇ Remove – Do <u>not</u> select Remove as the Job Status field must be populated.
    ◇ Active
    ◇ Leave without Pay, with Benefits
    ◇ Leave without Pay, without Benefits
    ◇ Leave with Pay, with Benefits
    ◇ Leave with Partial Pay, with Benefits – Used for 60% LTD.
    ◇ Terminated
21. Select the **Job Change Reason** from the dropdown box.

    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**

    ✳ **In many cases, the Job Change Reason Code for the job the employee is transferring <u>from</u> should match the Job Change Reason Code for the job the employee is transferring <u>to</u> (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).**

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

22. Enter the New Value for:
    ☉ **Regular Rate** – Employee's Pay Rate per Hour.
    ☉ **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
    ☉ **Hours Per Day** – Number of hours employee will work per day.
    ☉ **Hours Per Pay** – Number of hours employee will work per pay period.
    ☉ **Timesheet Organization** – Department timesheet organization number.
23. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.

    ✳ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**

24. If the Contract Type from step 19 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.

    ✳ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**

    ✳ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**

25. **Time Entry Method –** defaults to 'W' Web Time Entry. <u>You must enter 'P' for Monthly Non-Exempt employees paid on the PM payroll (the value should remain 'W' for employees paid on the PH payroll).</u>
26. Enter the New Value for:
    ☉ **Title**
27. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.

    ✳ **The Effective Date is the date this action will affect payroll.**

28. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.

    ✳ **Chart (COA) MUST be P for OPSU.**

    ✳ **Funding total must equal 100%.**

    ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.**

29. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
30. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
31. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
32. Review and then click on the Submit button.
   ✷ **The routing process does not begin until you click on the Save button and then the Submit button.**

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
    ✴ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
    ✴ **Enter the date the employee is to begin the NEW job (the job the employee is transferring to).**
4. Select **Approval Category** *Transfer to Hourly Job with END DATE, TRH1EP*.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
    ✴ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
    ✴ **Only one position can be ended with a Transfer approval category. If the employee has multiple jobs that need to be ended, use the approval category Terminate – Job Record Only, TRM1JP to end all jobs, with the exception of one (1) job. Then, use the Transfer approval category for the final job.**
    ✴ **Two (2) consecutive terminate dates are NOT allowed on a job record. If the employee is transferring from a position with an End Date (a Jobs Effective Date has been entered to Terminate/End Pay for the Job Record), contact Payroll Services to request that End Date be removed. After that date is removed, the Transfer EPAF can be processed.**
6. Click on Go.
7. Select the radio button for the position the employee is transferring from.
    ✴ **Note the heading for the box that contains the job information is labeled Terminate/End Pay Job Record Only. This indicates the job selected is the one that is being terminated.**
8. Click on **Next Approval Type**.
    ✴ **Do NOT select Go at this time. Selecting Go will result in the employee being transferred to the same job the employee is transferring from.**
9. Enter the Position number and Suffix for the job the employee is transferring to.
    ✴ **Note the heading for the box that contains the job information is labeled Transfer to Hourly Job. This indicates the job selected is the one the employee is transferring to.**
    ✴ **For the suffix, follow the same rules you would for a new hire or to add a new job (e.g., begin with the suffix 00.)**
10. Click on **Go**.
    ✴ **Do NOT select Next Approval Type a second time.**
11. Note the sections on the EPAF form.
    ✴ **The data in the Terminate/End Pay Transferred Job Record Only section is for the job the employee is transferring from.**
    ✴ **The data in the other sections (Transfer Employment Data, Transfer to Hourly Job, Update Labor Distribution Information, and Terminate/End Pay Job Record Only) is for the job the employee is transferring to.**
12. In the Terminate/End Pay Transferred Job Record Only section, enter the **Jobs Effective Date**.
    ✴ **The Jobs Effective Date is the last day the employee will be working in the job the employee is transferring from. This will normally be the day before the employee transfers to the new job; however, this date can be any date prior to the effective date of the new job (the job the employee is transferring to) and greater than or equal to the Last Paid Date of the prior job.**
    ✴ **If the dates overlap on the job the employee is transferring from and the job the employee is transferring to, STOP. The overlap of dates will result in a problem if the Contract Type for the job the employee is transferring from is Primary and the job the employee is transferring to is Primary. If both are Primary, use the appropriate Change Job EPAF (Hourly, Salaried, or Work Study) to change the Contract Type from Primary to Secondary for the job the employee is transferring from. After the Change Job EPAF has been applied (not just submitted or approved), the Transfer EPAF can be used to complete the needed transfer.**

13. Enter the **Personnel Date** for the position the employee is transferring from.
    ✷ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
14. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
    ✷ **See the Job Change Reason Codes List in Appendix A for additional information.**
    ✷ **In many cases, the Job Change Reason Code for the job the employee is transferring from should match the Job Change Reason Code for the job the employee is transferring to (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).**
15. In the Transfer Employment Data section, review the data in the Current Value column. Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate based on the job the employee is transferring to.
    ⊙ **Employee Status** (defaulted to Active)
    ⊙ **Employee Class Code**
       ✷ **See the list of OPSU Employee Class Codes in Appendix E.**
    ⊙ **Home Organization**
    ⊙ **Distribution Organization**
       ✷ **The Distribution Organization code should be the same as the Home Organization.**
    ⊙ **Benefit Category** (defaulted to JE, All Deds/Bens – Used for trans)
       ✷ **If the employee is transferring to a job with the same Benefit Category as the job the employee is transferring from (e.g., transferring from a 1.0 FTE hourly job to another 1.0 FTE hourly job), select the same category from the dropdown box as the category listed in the Current Value column. Otherwise, leave the New Value as JE, All Ded/Bens – Used for trans.**
       ✷ **If the Benefit Category is changing, the Benefit Category in the New Value column MUST be JE, All Deds/Bens – Used for trans. Current benefit deductions must be ended before the new deductions can be created. JE is a temporary transitional rule that will allow the Transfer EPAF to process and allow HR Benefits to review and make the appropriate changes.**
       ✷ **If there is an increase or decrease to the employee's FTE between the job the employee is transferring from and the job the employee is transferring to, leave the Benefit Category as JE, All Deds/Bens – Used for trans.**
16. In the Transfer to Hourly Job section, review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
    ✷ **The Job Begin Date is the date the assignment begins (the first day the employee can start any time entry) for the job the employee is transferring to.**
    ✷ **This date should be the same as the Jobs Effective Date.**
    ✷ **There is one exception where the Job Begin Date will not be the same as the Jobs Effective Date. If the employee was previously in this position, is the employee transferring back to an existing position and the position suffix value used is the same as what was used for the prior job for this employee? If yes, the Job Begin Date must be the same as the original Job Begin Date (as the field cannot be changed on an existing job).**
17. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
    ✷ **The Jobs Effective Date is the date this action will affect payroll.**
    ✷ **The Jobs Effective Date MUST be the same as the Job Begin Date. The only exception is when an employee was previously in this position and is transferring back to the position using the same position suffix value. See Step 16.**
18. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
    ✷ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
19. Review the **Contract Type** (defaulted to Primary) and use the dropdown box to change if appropriate.
    ◇ Primary – The employee's primary job.
    ◇ Secondary – Used to add an additional position for an employee.

◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).

✱ **Each employee can have only one Primary job.**

20. Review the **Job Status** (defaulted to Active) and use the dropdown box to change if appropriate.
    ◇ Remove – Do <u>not</u> select Remove as the Job Status field must be populated.
    ◇ Active
    ◇ Leave without Pay, with Benefits
    ◇ Leave without Pay, without Benefits
    ◇ Leave with Pay, with Benefits
    ◇ Leave with Partial Pay, with Benefits – Used for 60% LTD.
    ◇ Terminated

21. Select the **Job Change Reason** from the dropdown box.

    ✱ **See the Job Change Reason Codes List in Appendix A for additional information.**

    ✱ **In many cases, the Job Change Reason Code for the job the employee is transferring <u>from</u> should match the Job Change Reason Code for the job the employee is transferring <u>to</u> (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).**

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✱ **Hours per day and hours per pay should be based on the FTE.**

22. Enter the New Value for:
    ☉ **Regular Rate** – Employee's Pay Rate per Hour.
    ☉ **FTE** – Full-Time Equivalent. (✱ **Must be 1.0 or less**)
    ☉ **Hours Per Day** – Number of hours employee will work per day.
    ☉ **Hours Per Pay** – Number of hours employee will work per pay period.
    ☉ **Timesheet Organization** – Department timesheet organization number.

23. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.

    ✱ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**

24. If the Contract Type from step 19 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.

    ✱ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**

    ✱ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**

25. **Time Entry Method –** defaults to 'W' Web Time Entry. <u>You must enter 'P' for Monthly Non-Exempt employees paid on the PM payroll (must still be 'W' if paid on PH payroll).</u>

26. Enter the New Value for:
    ☉ **Title**

27. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.

    ✱ **The Effective Date is the date this action will affect payroll.**

28. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.

    ✱ **Chart (COA) MUST be P for OPSU.**

    ✱ **Funding total must equal 100%.**

    ✱ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.**

29. In the Terminate/End Pay Transfer Job Record Only section, enter the **Jobs Effective Date**.
    ✳ **The Jobs Effective Date is the date this action will affect payroll.**
30. Enter the **Personnel Date**.
    ✳ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes.**
31. Select the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**
32. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
33. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
34. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
35. Review and then click on the Submit button.
    ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
    ✴ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
    ✴ **Enter the date the employee is to begin the NEW job (the job the employee is transferring to).**
4. Select **Approval Category** *Transfer to Salaried Job no end date, TRS1NP*.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
    ✴ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
    ✴ **Only one position can be ended with a Transfer approval category. If the employee has multiple jobs that need to be ended, use the approval category Terminate – Job Record Only, TRM1JP to end all jobs, with the exception of one (1) job. Then, use the Transfer approval category for the final job.**
    ✴ **Two (2) consecutive terminate dates are NOT allowed on a job record. If the employee is transferring from a position with an End Date (a Jobs Effective Date has been entered to Terminate/End Pay for the Job Record), contact Payroll Services to request that End Date be removed. After that date is removed, the Transfer EPAF can be processed.**
6. Click on Go.
7. Select the radio button for the position the employee is transferring from.
    ✴ **Note the heading for the box that contains the job information is labeled Terminate/End Pay Job Record Only. This indicates the job selected is the one that is being terminated.**
8. Click on **Next Approval Type**.
    ✴ **Do NOT select Go at this time. Selecting Go will result in the employee being transferred to the same job the employee is transferring from.**
9. Enter the Position number and Suffix for the job the employee is transferring to.
    ✴ **Note the heading for the box that contains the job information is labeled Transfer to Salaried Job. This indicates the job selected is the one the employee is transferring to.**
    ✴ **For the suffix, follow the same rules you would for a new hire or to add a new job (e.g., begin with the suffix 00.)**
10. Click on **Go**.
    ✴ **Do NOT select Next Approval Type a second time.**
11. Note the sections on the EPAF form.
    ✴ **The data in the Terminate/End Pay Transferred Job Record Only section is for the job the employee is transferring from.**
    ✴ **The data in the other sections (Transfer Employment Data, Transfer to Salaried Job, and Update Labor Distribution Information) is for the job the employee is transferring to.**
12. In the Terminate/End Pay Transferred Job Record Only section, enter the **Jobs Effective Date**.
    ✴ **The Jobs Effective Date is the last day the employee will be working in the job the employee is transferring from. This will normally be the day before the employee transfers to the new job; however, this date can be any date prior to the effective date of the new job (the job the employee is transferring to) and greater than or equal to the Last Paid Date of the prior job.**
    ✴ **If the dates overlap on the job the employee is transferring from and the job the employee is transferring to, STOP. The overlap of dates will result in a problem if the Contract Type for job the employee is transferring from is Primary and the job the employee is transferring to is Primary. If both are Primary, use the appropriate Change Job EPAF (Hourly, Salaried, or Work Study) to change the Contract Type from Primary to Secondary for the job the employee is transferring from. After the Change Job EPAF has been applied (not just submitted or approved), the Transfer EPAF can be used to complete the needed transfer.**
13. Enter the **Personnel Date** for the position the employee is transferring from.

✴ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**

14. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
    ✴ **See the Job Change Reason Codes List in Appendix A for additional information.**
    ✴ **In many cases, the Job Change Reason Code for the job the employee is transferring from should match the Job Change Reason Code for the job the employee is transferring to (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).**

15. In the Transfer Employment Data section, review the data in the Current Value column. <u>Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate based on the job the employee is transferring to</u>.
    ⊙ **Employee Status** (defaulted to Active)
    ⊙ **Employee Class Code**
        ✴ **See the list of OPSU Employee Class Codes in Appendix E.**
    ⊙ **Home Organization**
    ⊙ **Distribution Organization**
        ✴ **The Distribution Organization code should be the same as the Home Organization.**
    ⊙ **Benefit Category** (defaulted to JE, All Deds/Bens – Used for trans)
        ✴ **If the employee is transferring to a job with the same Benefit Category as the job the employee is transferring from (e.g., transferring from a 1.0 FTE salaried job to another 1.0 FTE salaried job), select the same category from the dropdown box as the category listed in the Current Value column. Otherwise, leave the New Value as JE, All Ded/Bens – Used for trans.**
        ✴ **If the Benefit Category is changing, the Benefit Category in the New Value column MUST be JE, All Deds/Bens – Used for trans. Current benefit deductions must be ended before the new deductions can be created. JE is a temporary transitional rule that will allow the Transfer EPAF to process and allow HR Benefits to review and make the appropriate changes.**
        ✴ **If there is an increase or decrease to the employee's FTE between the job the employee is transferring from and the job the employee is transferring to, leave the Benefit Category as JE, All Deds/Bens – Used for trans.**

16. In the Transfer to Salaried Job section, review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
    ✴ **The Job Begin Date is the date the assignment begins for the job the employee is transferring to.**
    ✴ **This date should be the same as the Jobs Effective Date.**
    ✴ **There is one exception where the Job Begin Date will not be the same as the Jobs Effective Date. If the employee was previously in this position, is the employee transferring back to an existing position and the position suffix value used is the same as what was used for the prior job for this employee? If yes, the Job Begin Date must be the same as the original Job Begin Date (as the field cannot be changed on an existing job).**

17. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
    ✴ **The Jobs Effective Date is the date this action will affect payroll.**
    ✴ **The Jobs Effective Date MUST be the same as the Job Begin Date. The only exception is when an employee was previously in this position and is transferring back to the position using the same position suffix value. See Step 16.**

18. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
    ✴ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**

19. Review the **Contract Type** (defaulted to Primary) and use the dropdown box to change if appropriate.
    ◈ Primary – The employee's primary job.
    ◈ Secondary – Used to add an additional position for an employee.

◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).

✶ **Each employee can have only one Primary job.**

20. Review the **Job Status** (defaulted to Active) and use the dropdown box to change if appropriate.
    ◇ Remove – Do <u>not</u> select Remove as the Job Status field must be populated.
    ◇ Active
    ◇ Leave without Pay, with Benefits
    ◇ Leave without Pay, without Benefits
    ◇ Leave with Pay, with Benefits
    ◇ Leave with Partial Pay, with Benefits – Used for 60% LTD.
    ◇ Terminated

21. Select the **Job Change Reason** from the dropdown box.

    ✶ **See the Job Change Reason Codes List in Appendix A for additional information.**

    ✶ **In many cases, the Job Change Reason Code for the job the employee is transferring <u>from</u> should match the Job Change Reason Code for the job the employee is transferring <u>to</u> (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).**

22. Enter the new value as appropriate for:
    ⊙ **Annual Salary / Contract Amount** – Employee's actual annual salary.
    ⊙ **Factor** – Used to calculate the amount per month to be paid.

    ✶ **Annual Salary (or Contract Amount) / Factor = Monthly Payment**

    ✶ **As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for staff members.**

    ⊙ **Pays** – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)

    ✶ **For all new hires, Factor = Pays. Payroll Services will update the Pays field if a faculty member completes a deferral agreement.**

    ✶ **Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.**

    ⊙ **FTE** – Full-Time Equivalent. (✶ **Must be 1.0 or less**)
    ⊙ **Hours Per Day** – Number of hours employee will work per day.
    ⊙ **Hours Per Pay** – Number of hours employee will work per pay period.

    ✶ **If the FTE for this employee is not 1.0, the Hours per Day and Hours per Pay (based on the FTE) <u>MUST</u> be entered.**

    ⊙ **Timesheet Organization** – Department timesheet organization number.

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✶ **Hours per day and hours per pay should be based on the FTE.**

23. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.

    ✶ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**

24. If the Contract Type from step 19 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.

    ✶ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**

    ✶ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**

25. **Leave Report Method** (defaults based upon employee class). Enter 'W' if you wish a leave report to be presented in Employee Self-Service for this new job. Enter 'P' if you do not wish a leave report to be presented in Employee Self-Service for the new job.

26. Enter the New Value for:
  - ⊙ **Title**
27. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
  ✴ **The Effective Date is the date this action will affect payroll.**
28. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
  ✴ **Chart (COA) MUST be P for OPSU.**
  ✴ **Funding total must equal 100%.**
  ✴ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.**
29. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
30. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
31. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
32. Review and then click on the Submit button.
  ✴ **The routing process does not begin until you click on the Save button and then the Submit button.**

TRANSFER – EMPLOYEE TRANSFERRING TO A SALARIED JOB WITH END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✳ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
   ✳ **Enter the date the employee is to begin the <u>NEW</u> job (the job the employee is transferring to).**
4. Select **Approval Category** *Transfer to Salaried Job with END DATE, TRS1EP*.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✳ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✳ **Only one position can be ended with a Transfer approval category. If the employee has multiple jobs that need to be ended, use the approval category Terminate – Job Record Only, TRM1JP to end all jobs, with the exception of one (1) job. Then, use the Transfer approval category for the final job.**
   ✳ **Two (2) consecutive terminate dates are NOT allowed on a job record. If the employee is transferring from a position with an End Date (a Jobs Effective Date has been entered to Terminate/End Pay for the Job Record), contact Payroll Services to request that End Date be removed. After that date is removed, the Transfer EPAF can be processed.**
6. Click on Go.
7. Select the radio button for the position the employee is transferring <u>from</u>.
   ✳ **Note the heading for the box that contains the job information is labeled Terminate/End Pay Job Record Only. This indicates the job selected is the one that is being terminated.**
8. Click on **Next Approval Type**.
   ✳ **Do <u>NOT</u> select Go at this time. Selecting Go will result in the employee being transferred <u>to</u> the same job the employee is transferring <u>from</u>.**
9. Enter the Position number and Suffix for the job the employee is transferring <u>to</u>.
   ✳ **Note the heading for the box that contains the job information is labeled Transfer to Salaried Job. This indicates the job selected is the one the employee is transferring <u>to</u>.**
   ✳ **For the suffix, follow the same rules you would for a new hire or to add a new job (e.g., begin with the suffix 00.)**
10. Click on **Go**.
    ✳ **Do <u>NOT</u> select Next Approval Type a second time.**
11. Note the sections on the EPAF form.
    ✳ **The data in the Terminate/End Pay Transferred Job Record Only section is for the job the employee is transferring <u>from</u>.**
    ✳ **The data in the other sections (Transfer Employment Data, Transfer to Salaried Job, Update Labor Distribution Information, and Terminate/End Pay Job Record Only) is for the job the employee is transferring <u>to</u>.**
12. In the Terminate/End Pay Transferred Job Record Only section, enter the **Jobs Effective Date**.
    ✳ **The Jobs Effective Date is the last day the employee will be working in the job the employee is transferring <u>from</u>. This will normally be the day before the employee transfers to the new job; however, this date can be any date prior to the effective date of the new job (the job the employee is transferring to) and greater than or equal to the Last Paid Date of the prior job.**
    ✳ **If the dates overlap on the job the employee is transferring <u>from</u> and the job the employee is transferring <u>to</u>, STOP. The overlap of dates will result in a problem if the Contract Type for job the employee is transferring <u>from</u> is Primary and the job the employee is transferring <u>to</u> is Primary. If both are Primary, use the appropriate Change Job EPAF (Hourly, Salaried, or Work Study) to change the Contract Type from Primary to Secondary for the job the employee is transferring <u>from</u>. After the Change Job EPAF has been <u>applied</u> (not just submitted or approved), the Transfer EPAF can be used to complete the needed transfer.**

13. Enter the **Personnel Date** for the position the employee is transferring from.
   ✳ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
14. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
   ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**
   ✳ **In many cases, the Job Change Reason Code for the job the employee is transferring from should match the Job Change Reason Code for the job the employee is transferring to (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).**
15. In the Transfer Employment Data section, review the data in the Current Value column. Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate based on the job the employee is transferring to.
   ⊙ **Employee Status** (defaulted to Active)
   ⊙ **Employee Class Code**
      ✳ **See the list of OPSU Employee Class Codes in Appendix E.**
   ⊙ **Home Organization**
   ⊙ **Distribution Organization**
      ✳ **The Distribution Organization code should be the same as the Home Organization.**
   ⊙ **Benefit Category** (defaulted to JE, All Deds/Bens – Used for trans)
      ✳ **If the employee is transferring to a job with the same Benefit Category as the job the employee is transferring from (e.g., transferring from a 1.0 FTE salaried job to another 1.0 FTE salaried job), select the same category from the dropdown box as the category listed in the Current Value column. Otherwise, leave the New Value as JE, All Ded/Bens – Used for trans.**
      ✳ **If the Benefit Category is changing, the Benefit Category in the New Value column MUST be JE, All Deds/Bens – Used for trans. Current benefit deductions must be ended before the new deductions can be created. JE is a temporary transitional rule that will allow the Transfer EPAF to process and allow HR Benefits to review and make the appropriate changes.**
      ✳ **If there is an increase or decrease to the employee's FTE between the job the employee is transferring from and the job the employee is transferring to, leave the Benefit Category as JE, All Deds/Bens – Used for trans.**
16. In the Transfer to Salaried Job section, review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Job Begin Date is the date the assignment begins for the job the employee is transferring to.**
   ✳ **This date should be the same as the Jobs Effective Date.**
   ✳ **There is one exception where the Job Begin Date will not be the same as the Jobs Effective Date. If the employee was previously in this position, is the employee transferring back to an existing position and the position suffix value used is the same as what was used for the prior job for this employee? If yes, the Job Begin Date must be the same as the original Job Begin Date (as the field cannot be changed on an existing job).**
17. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   ✳ **The Jobs Effective Date is the date this action will affect payroll.**
   ✳ **The Jobs Effective Date MUST be the same as the Job Begin Date. The only exception is when an employee was previously in this position and is transferring back to the position using the same position suffix value. See Step 16.**
18. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   ✳ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
19. Review the **Contract Type** (defaulted to Primary) and use the dropdown box to change if appropriate.
   ◇ Primary – The employee's primary job.
   ◇ Secondary – Used to add an additional position for an employee.

◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).

✳ **Each employee can have only one Primary job.**

20. Review the **Job Status** (defaulted to Active) and use the dropdown box to change if appropriate.
   ◇ Remove – Do <u>not</u> select Remove as the Job Status field must be populated.
   ◇ Active
   ◇ Leave without Pay, with Benefits
   ◇ Leave without Pay, without Benefits
   ◇ Leave with Pay, with Benefits
   ◇ Leave with Partial Pay, with Benefits – Used for 60% LTD.
   ◇ Terminated
21. Select the **Job Change Reason** from the dropdown box.

   ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**

   ✳ **In many cases, the Job Change Reason Code for the job the employee is transferring <u>from</u> should match the Job Change Reason Code for the job the employee is transferring <u>to</u> (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).**
22. Enter the new value as appropriate for:
   ⊙ **Annual Salary / Contract Amount** – Employee's actual annual salary.
   ⊙ **Factor** – Used to calculate the amount per month to be paid.

      ✳ **Annual Salary (or Contract Amount) / Factor = Monthly Payment**

      ✳ **As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for staff members.**
   ⊙ **Pays** – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)

      ✳ **For all new hires, Factor = Pays. Payroll Services will update the Pays field if a faculty member completes a deferral agreement.**

      ✳ **Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.**
   ⊙ **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
   ⊙ **Hours Per Day** – Number of hours employee will work per day.
   ⊙ **Hours Per Pay** – Number of hours employee will work per pay period.

      ✳ **If the FTE for this employee is not 1.0, the Hours per Day and Hours per Pay (based on the FTE) <u>MUST</u> be entered.**
   ⊙ **Timesheet Organization** – Department timesheet organization number.

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

23. If the employee is to accrue leave using a different rule code than the default for the employee class group, use the dropdown box to select the appropriate **Job Leave Category** code.

   ✳ **See Appendix F for a list of Employee Classes with defaults and acceptable overrides.**
24. If the Contract Type from step 19 is Secondary or Overload <u>AND</u> the employee should accrue leave on this Secondary or Overload job, use the dropdown box for **Accrue Leave** and select Yes.

   ✳ **The Accrue Leave field is used to allow a Secondary or Overload job to accrue paid time off. In most instances, this field will not be entered (remain as Not Selected) or will be entered with Yes. In the rare instances where this job previously had an Accrue Leave value of Yes and should be changed to No, a comment explaining the change to No is required.**

   ✳ **If the Contract Type for this job is Primary, do <u>NOT</u> select Yes or No from the dropdown box. The New Value should remain as Not Selected. For Primary jobs, this is automatically completed by Banner and should not be overridden.**
25. **Leave Report Method** (defaults based upon employee class). Enter 'W' if you wish a leave report to be presented in Employee Self-Service for this new job. Enter 'P' if you do not wish a leave report to be presented in Employee Self-Service for the new job.
26. Enter the New Value for:
   ⊙ **Title**

27. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
    ✷ **The Effective Date is the date this action will affect payroll.**
28. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
    ✷ **Chart (COA) MUST be P for OPSU.**
    ✷ **Funding total must equal 100%.**
    ✷ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.**
29. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.
    ✷ **The Jobs Effective Date is the date this action will affect payroll. Use the termination date – the last day the employee is scheduled to work in this position.**
30. Enter the **Personnel Date**.
    ✷ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
31. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
    ✷ **See the Job Change Reason Codes List in Appendix A for additional information.**
32. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
33. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
34. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
35. Review and then click on the Submit button.
    ✷ **The routing process does not begin until you click on the Save button and then the Submit button.**

TRANSFER – EMPLOYEE TRANSFERRING TO A WORK STUDY JOB
WITH NO END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✴ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
   ✴ **Enter the date the employee is to begin the NEW job (the job the employee is transferring to).**
4. Select **Approval Category** *Transfer to Work Study Job no end date, TRW1NP*.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✴ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✴ **Only one position can be ended with a Transfer approval category. If the employee has multiple jobs that need to be ended, use the approval category Terminate – Job Record Only, TRM1JP to end all jobs, with the exception of one (1) job. Then, use the Transfer approval category for the final job.**
   ✴ **Two (2) consecutive terminate dates are NOT allowed on a job record. If the employee is transferring from a position with an End Date (a Jobs Effective Date has been entered to Terminate/End Pay for the Job Record), contact Payroll Services to request that End Date be removed. After that date is removed, the Transfer EPAF can be processed.**
6. Click on Go.
7. Select the radio button for the position the employee is transferring from.
   ✴ **Note the heading for the box that contains the job information is labeled Terminate/End Pay Job Record Only. This indicates the job selected is the one that is being terminated.**
8. Click on **Next Approval Type**.
   ✴ **Do NOT select Go at this time. Selecting Go will result in the employee being transferred to the same job the employee is transferring from.**
9. Enter the Position number and Suffix for the job the employee is transferring to.
   ✴ **Note the heading for the box that contains the job information is labeled Transfer to Hourly Job. This indicates the job selected is the one the employee is transferring to.**
   ✴ **For the suffix, follow the same rules you would for a new hire or to add a new job (e.g., begin with the suffix 00.)**
10. Click on **Go**.
    ✴ **Do NOT select Next Approval Type a second time.**
11. Note the sections on the EPAF form.
    ✴ **The data in the Terminate/End Pay Job Record Only section is for the job the employee is transferring from.**
    ✴ **The data in the other sections (Transfer Employment Data, Transfer to Hourly Job, and Update Labor Distribution Information) is for the job the employee is transferring to.**
12. In the Terminate/End Pay Job Record Only section, enter the **Jobs Effective Date**.
    ✴ **The Jobs Effective Date is the last day the employee will be working in the job the employee is transferring from. This will normally be the day before the employee transfers to the new job; however, this date can be any date prior to the effective date of the new job (the job the employee is transferring to) and greater than or equal to the Last Paid Date of the prior job.**
    ✴ **If the dates overlap on the job the employee is transferring from and the job the employee is transferring to, STOP. The overlap of dates will result in a problem if the Contract Type for job the employee is transferring from is Primary and the job the employee is transferring to is Primary. If both are Primary, use the appropriate Change Job EPAF (Hourly, Salaried, or Work Study) to change the Contract Type from Primary to Secondary for the job the employee is transferring from. After the Change Job EPAF has been applied (not just submitted or approved), the Transfer EPAF can be used to complete the needed transfer.**

13. Enter the **Personnel Date** for the position the employee is transferring from.
    ✶ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
14. Select the **Job Change Reason** from the dropdown box.
    ✶ **See the Job Change Reason Codes List in Appendix A for additional information.**
    ✶ **In many cases, the Job Change Reason Code for the job the employee is transferring from should match the Job Change Reason Code for the job the employee is transferring to (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).**
15. In the Transfer Employment Data section, review the data in the Current Value column. Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate based on the job the employee is transferring to.
    - ☉ **Employee Status** (defaulted to Active)
    - ☉ **Employee Class Code**
        ✶ **See the list of OPSU Employee Class Codes in Appendix E.**
    - ☉ **Home Organization**
    - ☉ **Distribution Organization**
        ✶ **The Distribution Organization code should be the same as the Home Organization.**
    - ☉ **Benefit Category** (defaulted to JE, All Deds/Bens – Used for trans)
        ✶ **If the employee is transferring to a job with the same Benefit Category as the job the employee is transferring from (e.g., transferring from a Work Study job to another Work Study job), select the same category from the dropdown box as the category listed in the Current Value column. Otherwise, leave the New Value as JE, All Ded/Bens – Used for trans.**
        ✶ **If the Benefit Category is changing, the Benefit Category in the New Value column MUST be JE, All Deds/Bens – Used for trans. Current benefit deductions must be ended before the new deductions can be created. JE is a temporary transitional rule that will allow the Transfer EPAF to process and allow HR Benefits to review and make the appropriate changes.**
        ✶ **If there is an increase or decrease to the employee's FTE between the job the employee is transferring from and the job the employee is transferring to, leave the Benefit Category as JE, All Deds/Bens – Used for trans.**
16. In the Transfer to Hourly Job section, review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
    ✶ **The Job Begin Date is the date the assignment begins (the first day the employee can start any time entry) for the job the employee is transferring to.**
    ✶ **This date should be the same as the Jobs Effective Date.**
    ✶ **There is one exception where the Job Begin Date will not be the same as the Jobs Effective Date. If the employee was previously in this position, is the employee transferring back to an existing position and the position suffix value used is the same as what was used for the prior job for this employee? If yes, the Job Begin Date must be the same as the original Job Begin Date (as the field cannot be changed on an existing job).**
17. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
    ✶ **The Jobs Effective Date is the date this action will affect payroll.**
    ✶ **The Jobs Effective Date MUST be the same as the Job Begin Date. The only exception is when an employee was previously in this position and is transferring back to the position using the same position suffix value. See Step 16.**
18. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
    ✶ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
19. Review the **Contract Type** (defaulted to Primary) and use the dropdown box to change if appropriate.
    - ◇ Primary – The employee's primary job.
    - ◇ Secondary – Used to add an additional position for an employee.

◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).

✳ **Each employee can have only one Primary job.**

20. Review the **Job Status** (defaulted to Active) and use the dropdown box to change if appropriate.
    ◇ Remove – Do <u>not</u> select Remove as the Job Status field must be populated.
    ◇ Active
    ◇ Leave without Pay, with Benefits
    ◇ Leave without Pay, without Benefits
    ◇ Leave with Pay, with Benefits
    ◇ Leave with Partial Pay, with Benefits – Used for 60% LTD.
    ◇ Terminated
21. Select the **Job Change Reason** from the dropdown box.

    ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**

    ✳ **In many cases, the Job Change Reason Code for the job the employee is transferring <u>from</u> should match the Job Change Reason Code for the job the employee is transferring <u>to</u> (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).**

22. Enter the New Value for:
    a. **Regular Rate** – Employee's Pay Rate per Hour.
    b. **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
    c. **Hours Per Day** – Number of hours employee will work per day.
    d. **Hours Per Pay** – Number of hours employee will work per pay period.
    e. **Timesheet Organization** – Department timesheet organization number.
    f. **Title**

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

23. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.

    ✳ **The Effective Date is the date this action will affect payroll.**

24. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.

    ✳ **Chart (COA) MUST be P for OPSU.**

    ✳ **Funding total must equal 100%.**

    ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.**

25. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
26. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
27. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
28. Review and then click on the Submit button.

    ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

TRANSFER – EMPLOYEE TRANSFERRING TO A WORK STUDY JOB
WITH END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✷ **Use % as the wildcard for searches.**
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).
   ✷ **Enter the date the employee is to begin the NEW job (the job the employee is transferring to).**
4. Select **Approval Category** *Transfer to Work Study Job with end date, TRW1EP*.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✷ **Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.**
   ✷ **Only one position can be ended with a Transfer approval category. If the employee has multiple jobs that need to be ended, use the approval category Terminate – Job Record Only, TRM1JP to end all jobs, with the exception of one (1) job. Then, use the Transfer approval category for the final job.**
   ✷ **Two (2) consecutive terminate dates are NOT allowed on a job record. If the employee is transferring from a position with an End Date (a Jobs Effective Date has been entered to Terminate/End Pay for the Job Record), contact Payroll Services to request that End Date be removed. After that date is removed, the Transfer EPAF can be processed.**
6. Click on Go.
7. Select the radio button for the position the employee is transferring from.
   ✷ **Note the heading for the box that contains the job information is labeled Terminate/End Pay Job Record Only. This indicates the job selected is the one that is being terminated.**
8. Click on **Next Approval Type**.
   ✷ **Do NOT select Go at this time. Selecting Go will result in the employee being transferred to the same job the employee is transferring from.**
9. Enter the Position number and Suffix for the job the employee is transferring to.
   ✷ **Note the heading for the box that contains the job information is labeled Transfer to Hourly Job. This indicates the job selected is the one the employee is transferring to.**
   ✷ **For the suffix, follow the same rules you would for a new hire or to add a new job (e.g., begin with the suffix 00.)**
10. Click on **Go**.
    ✷ **Do NOT select Next Approval Type a second time.**
11. Note the sections on the EPAF form.
    ✷ **The data in the Terminate/End Pay Job Record Only section is for the job the employee is transferring from.**
    ✷ **The data in the other sections (Transfer Employment Data, Transfer to Hourly Job, and Update Labor Distribution Information) is for the job the employee is transferring to.**
12. In the Terminate/End Pay Job Record Only section, enter the **Jobs Effective Date**.
    ✷ **The Jobs Effective Date is the last day the employee will be working in the job the employee is transferring from. This will normally be the day before the employee transfers to the new job; however, this date can be any date prior to the effective date of the new job (the job the employee is transferring to) and greater than or equal to the Last Paid Date of the prior job.**
    ✷ **If the dates overlap on the job the employee is transferring from and the job the employee is transferring to, STOP. The overlap of dates will result in a problem if the Contract Type for job the employee is transferring from is Primary and the job the employee is transferring to is Primary. If both are Primary, use the appropriate Change Job EPAF (Hourly, Salaried, or Work Study) to change the Contract Type from Primary to Secondary for the job the employee is transferring from. After the Change Job EPAF has been applied (not just submitted or approved), the Transfer EPAF can be used to complete the needed transfer.**

13. Enter the **Personnel Date** for the position the employee is transferring from.
   ✴ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
14. Select the **Job Change Reason** from the dropdown box.
   ✴ **See the Job Change Reason Codes List in Appendix A for additional information.**
   ✴ **In many cases, the Job Change Reason Code for the job the employee is transferring from should match the Job Change Reason Code for the job the employee is transferring to (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).**
15. In the Transfer Employment Data section, review the data in the Current Value column. Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate based on the job the employee is transferring to.
   ⊙ **Employee Status** (defaulted to Active)
   ⊙ **Employee Class Code**
      ✴ **See the list of OPSU Employee Class Codes in Appendix E.**
   ⊙ **Home Organization**
   ⊙ **Distribution Organization**
      ✴ **The Distribution Organization code should be the same as the Home Organization.**
   ⊙ **Benefit Category** (defaulted to JE, All Deds/Bens – Used for trans)
      ✴ **If the employee is transferring to a job with the same Benefit Category as the job the employee is transferring from (e.g., transferring from a Work Study job to another Work Study job), select the same category from the dropdown box as the category listed in the Current Value column. Otherwise, leave the New Value as JE, All Ded/Bens – Used for trans.**
      ✴ **If the Benefit Category is changing, the Benefit Category in the New Value column MUST be JE, All Deds/Bens – Used for trans. Current benefit deductions must be ended before the new deductions can be created. JE is a temporary transitional rule that will allow the Transfer EPAF to process and allow HR Benefits to review and make the appropriate changes.**
      ✴ **If there is an increase or decrease to the employee's FTE between the job the employee is transferring from and the job the employee is transferring to, leave the Benefit Category as JE, All Deds/Bens – Used for trans.**
16. In the Transfer to Hourly Job section, review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
   ✴ **The Job Begin Date is the date the assignment begins (the first day the employee can start any time entry) for the job the employee is transferring to.**
   ✴ **This date should be the same as the Jobs Effective Date.**
   ✴ **There is one exception where the Job Begin Date will not be the same as the Jobs Effective Date. If the employee was previously in this position, is the employee transferring back to an existing position and the position suffix value used is the same as what was used for the prior job for this employee? If yes, the Job Begin Date must be the same as the original Job Begin Date (as the field cannot be changed on an existing job).**
17. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   ✴ **The Jobs Effective Date is the date this action will affect payroll.**
   ✴ **The Jobs Effective Date MUST be the same as the Job Begin Date. The only exception is when an employee was previously in this position and is transferring back to the position using the same position suffix value. See Step 16.**
18. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   ✴ **This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.**
19. Review the **Contract Type** (defaulted to Primary) and use the dropdown box to change if appropriate.
   ◇ Primary – The employee's primary job.
   ◇ Secondary – Used to add an additional position for an employee.

- ✧ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
  - ✳ **Each employee can have only one Primary job.**
20. Review the **Job Status** (defaulted to Active) and use the dropdown box to change if appropriate.
    - ✧ Remove – Do <u>not</u> select Remove as the Job Status field must be populated.
    - ✧ Active
    - ✧ Leave without Pay, with Benefits
    - ✧ Leave without Pay, without Benefits
    - ✧ Leave with Pay, with Benefits
    - ✧ Leave with Partial Pay, with Benefits – Used for 60% LTD.
    - ✧ Terminated
21. Select the **Job Change Reason** from the dropdown box.
    - ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**
    - ✳ **In many cases, the Job Change Reason Code for the job the employee is transferring <u>from</u> should match the Job Change Reason Code for the job the employee is transferring <u>to</u> (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).**
22. Enter the New Value for:
    - g. **Regular Rate** – Employee's Pay Rate per Hour.
    - h. **FTE** – Full-Time Equivalent. (✳ **Must be 1.0 or less**)
    - i. **Hours Per Day** – Number of hours employee will work per day.
    - j. **Hours Per Pay** – Number of hours employee will work per pay period.
    - k. **Timesheet Organization** – Department timesheet organization number.
    - l. **Title**

FTE	Hours/ Day	Hours/ Pay
1.0	7.50	162.50
.75	5.63	121.88
.50	3.75	81.25
.25	1.88	40.63

✳ **Hours per day and hours per pay should be based on the FTE.**

23. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
    - ✳ **The Effective Date is the date this action will affect payroll.**
24. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
    - ✳ **Chart (COA) MUST be P for OPSU.**
    - ✳ **Funding total must equal 100%.**
    - ✳ **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.**
25. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.
    - ✳ **The Jobs Effective Date is the date this action will affect payroll.**
26. Enter the **Personnel Date**.
    - ✳ **This date does <u>not</u> affect pay and serves as an information field for historical, audit, or reporting purposes.**
27. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
    - ✳ **See the Job Change Reason Codes List in Appendix A for additional information.**
28. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
29. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
30. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
31. Review and then click on the Submit button.
    - ✳ **The routing process does not begin until you click on the Save button and then the Submit button.**

APPENDIX A – JOB CHANGE REASON CODES LIST

Job Change Type	Description	Job Change Reason Code	Description	Use / Additional Information & Notes
HR	Hire Action	1CURR	Concurrent Appointment	Employee has another active job at the same time
		1LTD	Employee LTD	Employee starting LTD (Used by Absence Manager)
		1NEW	New Hire	Employee has never worked for OPSU
		1REH	Rehire	Employee has been separated from OPSU and is returning
		1REIN	Reinstate	Employee with benefits is returning within 30 days of separation
		IRET	Employee Retirement	Employee starting retirement (Used by Payroll)
SA	Salary Adjustment	CADJ	Salary Adjustment	Salary adjustments that do not fit into other categories
		CCDP	Career Development Increase	Increase in Career Development Plan
		CCDPX	Career Development Increase / Exception	Increase in Career Development Plan >10%
		CDEM	Demotion	Employee is being demoted
		CDPI	Demonstrated Proficiency Increase	Employee receives a raise due to increased volume of work or duties
		CDPIX	Demonstrated Proficiency Increase / Exception	Employee receives a raise >10% due to increase of volume of work or duties
		CEQI	Equity Increase	Employee receives a raise due to a formal pay study conducted by HR
		CEQIX	Equity Increase / Exception	Employee receives a raise >10% due to a formal pay study conducted by HR
		CFTED	Work Hours / FTE Decrease	Employee will begin working less hours
		CFTEI	Work Hours / FTE Increase	Employee will begin working more hours
		CINC	Incentive Pay Increase	Incentive provided for education attainment, professional cert, etc.
		CINCX	Incentive Pay Increase / Exception	Incentive >10% provided for education attainment, professional cert, etc
		CINT	Interim Increase	Employee is receiving additional payment for interim roll
		CINTX	Interim Increase / Exception	Employee is receiving additional payment for interim roll >10%
		CJEV	Job Evaluation Adjustment	Employee is receiving an adjustment due to evaluation of job duties
		CRCL	Reclassification	A change in PCLASS and/or ECLASS
		CRCLX	Reclassification / Exception	A change in PCLASS and/or ECLASS with an increase >10%

		XCHNG	Change Additive Pay	**Change is being made to additive pay**
		XNEW	Enter New Additive Pay	**Additive pay is beginning. Do not use (see values below).**
		XNWAU	Auto Allowance	**Job associated with Auto Allowance payment**
		XNWCP	Cell Phone Allowance	**Job associated with Cell Phone Allowance payment**
		XNWD1	Department/Division/College Administrative Additive Pay	**Job Associated with additional pay associated with Administrative Duties for Departmental/Division/College administrators and chairs**
		XNWEX	Expense Allowance	**Job associated with Expense Allowance payments**
XP	Extra Pay	XNWHA	Housing Allowance	**Job associated with Housing Allowance payments**
		XNWF1	Faculty Endowment	**Job associated with Endowed Faculty Stipend payments**
		XNWPS	Personal Service Contract	**Job associated with Personal Service Contracts for Coaches (OSU only)**
		XNWSUM	Summer Appointment	**Job associated with summer teaching or research contracts for full-time faculty and staff**
		XNWOTH	Other Additive Pay	**Job associated with Other Additive Pay for employees**
		XSTOP	Stop Additive Pay	**Additive pay is stopping**
		CDATA	Data Correction	**Data correction is being made for an existing job record**
		CFLSA	FLSA Regulatory Changes	**Change due to FLSA regulations (Used by HR)**
		CFREG	Federal Regulatory Changes	**Changes due to federal regulations (Used by HR)**
		CLOC	Job Location Change	**Employee is having their job location change**
		CMER	Merit Increase / State	**Employee is receiving an increase based on merit program**
		CMERX	Merit Increase / State / Exception	**Employee is receiving an increase >10% based on merit program**
CH	Other Change	CPRO	Promotion	**Employee is receiving a promotion**
		CPROX	Promotion / Exception	**Employee is receiving a promotion >10%**
		CSUPV	Supervisor Change	**Employee has a change of supervisor**
		CTRAN	Lateral Transfer	**Employee is transferring to a lateral position**
		CTTLE	Title Change	**Employee position title is changing**
		FYBUD	Fiscal Year Budget	**Used once salary planner is finished (system generated)**
		FYREP	Fiscal Year Budget Replacement	**Replacing budget from Salary Planner update (Used only to update errors)**
LV	Leave	LAYOF	Layoff	**Employee is starting layoff rights**

		LRET	Return from Leave	Employee is returning from approved leave (Update status to Active)
		LSABB	Sabbatical Leave	Faculty is starting a sabbatical
		LSWOP	Suspension without Pay	Employee is suspended without pay
		LSWP	Suspension with Pay	Employee is suspended with pay
		LWC	Leave Workers Comp	Employee is on leave due to workers' comp
		LWCR	Leave Workers Comp Return	Employee is returning from leave due to workers' comp
		LWOP	Leave without Pay	Employee is on leave without pay
		LWP	Leave with Pay	Employee is on leave with pay
TA	Termination	2END	End of Appointment	Job assignment has ended
		2FND	Funding Expiration	Funding has ended (typically used for grants)
		2LTD	Employee LTD	Employee is starting LTD (used by campus)
		2RET	Employee Retirement	Employee is retiring (used by campus)
		2SEP	Employee Separation	DO NOT USE - - - Use a more detailed separation code (e.g., Retirement, Death, Voluntary, Involuntary)
		2SEPD	Employee Death	Death of an active employee (use date of death as the effective date)
		2SEPI	Employee Involuntary Separation	Employment has been terminated either for cause or other involuntary reason
		2SEPV	Employee Voluntary Separation	Employee is resigning from position
		XTND	Extended Pay Date	Job is extended to pay past job end date (used by Payroll)

APPENDIX B – ENP JOB CHANGE REASON CODES AND EARNINGS CODES CHART

Job Change Reason		Earnings Code		Use / Additional Information & Notes
Code	Description	Code	Description	
ENPSP	Special Projects	130	Extra Time Pay	Extra work; grading papers; special short-term projects
ENPRP	Retroactive Pay	A10	Regular Monthly Adj	EPAF was late and employee was not paid; adjustment to a payment received in a prior month
ENPIN	Incentive Pay	081	Approved Incentive Plans	Certificate Programs (e.g., Ambassador Program, Leadership Program)
ENPAW	Awards	080	Awards	Award for Excellence; Outstanding Staff Award; published paper
ENPMV	Moving Allowance	515	Moving Allowance	Salary additive for moving expenses for new faculty/staff

APPENDIX C – ENP DATE CHART – EXAMPLE FOR ENPN1P [1]

✷ **The regular monthly payroll will pay on the last day of the month and the supplemental payroll will pay on the 12th of the FOLLOWING month, unless the 12th is a non-working day.**

Pay Period		Pay Date [2]	Query Date	Exception to Normal Pay Add New Job			Exception to Normal Pay Payment Information		Update Labor Distribution Information	Terminate / End Pay Job Record Only	
				Job Begin Date	Job Effective Date	Personnel Date	Effective Date	End Date	Effective Date	Jobs Effective Date	Personnel Date
July	Regular	07/31/YYYY	07/01/YYYY	07/01/YYYY	07/01/YYYY	Info Only	07/01/YYYY	08/01/YYYY	07/01/YYYY	07/31/YYYY	07/31/YYYY
	Supplemental	08/12/YYYY									
August	Regular	08/31/YYYY	08/01/YYYY	08/01/YYYY	08/01/YYYY	Info Only	08/01/YYYY	09/01/YYYY	08/01/YYYY	08/31/YYYY	08/31/YYYY
	Supplemental	09/12/YYYY									
September	Regular	09/30/YYYY	09/01/YYYY	09/01/YYYY	09/01/YYYY	Info Only	09/01/YYYY	10/01/YYYY	09/01/YYYY	09/30/YYYY	09/30/YYYY
	Supplemental	10/12/YYYY									
October	Regular	10/31/YYYY	10/01/YYYY	10/01/YYYY	10/01/YYYY	Info Only	10/01/YYYY	11/01/YYYY	10/01/YYYY	10/31/YYYY	10/31/YYYY
	Supplemental	11/12/YYYY									
November	Regular	11/30/YYYY	11/01/YYYY	11/01/YYYY	11/01/YYYY	Info Only	11/01/YYYY	12/01/YYYY	11/01/YYYY	11/30/YYYY	11/30/YYYY
	Supplemental	12/12/YYYY									
December	Regular	12/31/YYYY	12/01/YYYY	12/01/YYYY	12/01/YYYY	Info Only	12/01/YYYY	01/01/YYYY	12/01/YYYY	12/31/YYYY	12/31/YYYY
	Supplemental	01/12/YYYY									
January	Regular	01/31/YYYY	01/01/YYYY	01/01/YYYY	01/01/YYYY	Info Only	01/01/YYYY	02/01/YYYY	01/01/YYYY	01/31/YYYY	01/31/YYYY
	Supplemental	02/12/YYYY									
February	Regular	02/28/YYYY	02/01/YYYY	02/01/YYYY	02/01/YYYY	Info Only	02/01/YYYY	03/01/YYYY	02/01/YYYY	02/28/YYYY	02/28/YYYY
	Supplemental	03/12/YYYY									
March	Regular	03/31/YYYY	03/01/YYYY	03/01/YYYY	03/01/YYYY	Info Only	03/01/YYYY	04/01/YYYY	03/01/YYYY	03/31/YYYY	03/31/YYYY
	Supplemental	04/12/YYYY									
April	Regular	04/30/YYYY	04/01/YYYY	04/01/YYYY	04/01/YYYY	Info Only	04/01/YYYY	05/01/YYYY	04/01/YYYY	04/30/YYYY	04/30/YYYY
	Supplemental	05/12/YYYY									
May	Regular	05/31/YYYY	05/01/YYYY	05/01/YYYY	05/01/YYYY	Info Only	05/01/YYYY	06/01/YYYY	05/01/YYYY	05/31/YYYY	05/31/YYYY
	Supplemental	06/12/YYYY									
June	Regular	06/30/YYYY	06/01/YYYY	06/01/YYYY	06/01/YYYY	Info Only	06/01/YYYY	07/01/YYYY	06/01/YYYY	06/30/YYYY	06/30/YYYY
	Supplemental	07/12/YYYY									

[1] - Similar dates would be used for the approval category ENPR1P; however, the first section on the EPAP will be titled Exception to Normal Pay *Reactivate Existing* Job, and the Job Begin Date field will not appear in that section.

[2] - Pays on the 12th of the following month, unless the 12th is a non-working day.

APPENDIX D – SUFFIX – TYPE OF PAYMENT CHART

Type of Payment	Suffix
Exception to Normal Pay	Z0 through Z9
Auto Allowance	AU
Cell Phone	CP
Summer Appointment	Begins with S
Faculty Endowment	F1
Department / College / Division Administrative Additive	D1
Housing Allowance	HA

APPENDIX E – EMPLOYEE CLASS CODES

EClass[1]	Description
PA	OPSU Faculty 9-month
PB	OPSU Faculty 10-month
PC	OPSU Faculty 11-month
PD	OPSU Temp Faculty
PE	OPSU Executive
PG	OPSU AdminProf
PJ	OPSU Non-Exempt Staff (Paid on PM Payroll)
PS	OPSU Temp Staff hrly
PU	OPSU Stdnt
PW	OPSU WS Stdnt
PX	OPSU LTD
PY	OPSU Retirees
ZA	Affiliates

[1] - In Banner, the EClass, or Employee Classification, is a two-character code that identifies employees by groups with common processing characteristics.

APPENDIX F – EMPLOYEE CLASS CODES WITH LEAVE ACCRUAL DEFAULTS AND ACCEPTABLE OVERRIDES

PTRECLS_VPDI_ CODE	PTRECLS_CODE	PTRECLS_LONG_DESC	Default Leave Rule	PTVLCAT_DESC	Exception Leave Rule	PTVLCAT_DESC_1
OPSU	PA	OPSU Faculty 9-month	PA	OPSU Faculty 9-mo	PP	OPSU AdminProf 2
OPSU	PA	OPSU Faculty 9-month	PA	OPSU Faculty 9-mo	XX	Ineligible for Leave
OPSU	PC	OPSU Faculty 11-month	PC	OPSU Faculty 11-mo	PP	OPSU AdminProf 2
OPSU	PJ	OPSU Staff	PS	OPSU Staff	PC	OPSU Faculty 11-mo
OPSU	PJ	OPSU Staff	PS	OPSU Staff	XX	Ineligible for Leave

Updates:

Date	Description of Update
7-11-19	Add Work Study with end date EPAFS
10-22-2019	Added timesheet organization field to New ENP job and Reactivate Existing ENP job. Added Job Status to terminated section of Reactivate Hourly and Salaried with end date EPAFs.
5-22-2020	Added Leave Report Method field to additional job, change job and transfer jobs for salaried employees Time Entry Method revised for hourly new employee, additional job, and transfer job to allow option for monthly non-exempt leave reports Update new change reasons in the appropriate appendix.