ELECTRONIC PERSONNEL ACTION FORMS (EPAFs)

HOW TO GUIDE

WARNING:

This guide may have outdated information. Payroll has made notes when incorrect information is identified.

Effective September 20, 2017
Last Updated October 11, 2019

APPROVAL CATEGORIES

✷Important info – The "Hourly" Approval Categories should be used for both Bi-weekly and Monthly non-exempt assignments.

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

Key:
◈ - Dropdown box options
⊙ - Listed items for which a New Value can be entered
✷ - Tip

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
Transfer to Work Study Job with End Date

Appendix:

A – Job Change Reason Codes List
B – ENP Job Change Reason Codes and Earnings Codes Chart
C – ENP Date Chart
D – Suffix – Type of Payment Chart
E – Employee Class Codes with Leave Accrual Defaults and Acceptable Overrides

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, NWHRH***.
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. 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.
   - **Employee Class Code**
     ✷ Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
   - **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 biweekly employees, enter the first day of the pay period for which the job record is to be effective.
    ✷ 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 biweekly employees, enter the first day of the pay period for which the job record is to be effective.
    ✷ 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 not 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	8	80
.75	6	60
.50	4	40
.25	2	20

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

16. Review **Time Entry Method** and change if appropriate.
    - Remove – Do <u>not</u> select Remove as the Time Entry Method field must be populated.
    - Payroll Time Entry – Enter this value for Monthly Non-Exempt staff.
    - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.) or the employee is paid monthly.
    - Department Time Entry with Approvals – Used by OSU-CHS only.
    - Third Party with Approvals – TimePro, AiM, Kronos, etc.
17. 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 E for a list of Employee Classes with defaults and acceptable overrides.
18. 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 annual / sick leave. 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.
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) <u>MUST</u> be X for the OSU System.
    ✷ 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.
    ✷ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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, NWHRE***.
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. 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.
   - **Employee Class Code**
     - ✷ Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
   - **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 biweekly employees, enter the first day of the pay period for which the job record is to be effective.
    - ✷ 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 biweekly employees, enter the first day of the pay period for which the job record is to be effective.
    - ✷ 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 not 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	8	80
.75	6	60
.50	4	40
.25	2	20

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

16. Review **Time Entry Method** and change if appropriate.
    - Remove – Do not select Remove as the Time Entry Method field must be populated.
    - Payroll Time Entry – Enter this value for Monthly Non-Exempt staff.
    - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.) or the employee is paid monthly.
    - Department Time Entry with Approvals – Used by OSU-CHS only.
    - Third Party with Approvals – TimePro, AiM, Kronos, etc.
17. 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 E for a list of Employee Classes with defaults and acceptable overrides.
18. If the Contract Type from step 13 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 annual / sick leave. 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.
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 X for the OSU System.
    ✷ 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. For biweekly employees, enter the last day of the pay period for which the terminate job record should be effective, and enter the actual last day of work as the Personnel Date.
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.

    ✷ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

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.

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, NWHRS***.
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. 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.
   - **Employee Class Code**
     ✷ Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
   - **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 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 not 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** – 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) MUST be entered.
- ⊙ **Timesheet Organization** – Department timesheet organization number.

FTE	Hours/ Day	Hours/ Pay
1.0	8	173.33
.75	6	130.00
.50	4	86.67
.25	2	43.33

✷ 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 E for a list of Employee Classes with defaults and acceptable overrides.
17. If the Contract Type from step 13 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 annual / sick leave. 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. 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 X for the OSU System.
    ✷ 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 not 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 not 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.
    ✷ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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, NWHRS2***.
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. 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.
   - **Employee Class Code**
     ✷ Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
   - **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 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 not 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** – 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) MUST be entered.
- **Timesheet Organization** – Department timesheet organization number.

FTE	Hours/ Day	Hours/ Pay
1.0	8	173.33
.75	6	130.00
.50	4	86.67
.25	2	43.33

✷ 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 E for a list of Employee Classes with defaults and acceptable overrides.
17. If the Contract Type from step 13 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 annual / sick leave. 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. 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 X for the OSU System.
    - ✷ 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.
    - ✷ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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 No end date, NWHWS***.
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. 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.
   - **Employee Class Code**
     ✴ Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
   - **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 biweekly employees, enter the first day of the pay period for which the job record is to be effective.
    ✴ 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 biweekly employees, enter the first day of the pay period for which the job record is to be effective.
    ✴ 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 not 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.
    ✴ If no date is entered for the Personnel Date, this field will be defaulted to the Jobs Effective Date upon applying the EPAF.
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	8	80
.75	6	60
.50	4	40
.25	2	20

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

16. Review **Time Entry Method** and change if appropriate.
    - ◈ Remove – Do <u>not</u> select Remove as the Time Entry Method field must be populated.
    - ◈ Payroll Time Entry – Do <u>not</u> select Payroll Time Entry.
    - ◈ Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.).
    - ◈ Department Time Entry with Approvals – Used by OSU-CHS only.
    - ◈ Third Party with Approvals – TimePro, AiM, Kronos, etc.
17. Enter the new value for:
    - ⊙ **Title**
18. 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.

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

    ✷ Chart (COA) <u>MUST</u> be X for the OSU System.

    ✷ 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.

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

    ✷ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

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.

NEW EMPLOYEE – 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 *New Work Study Employee with END DATE,*** NWHWE.
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. 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.
   - **Employee Class Code**
     ✷ Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
   - **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 biweekly employees, enter the first day of the pay period for which the job record is to be effective.
    ✷ 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 biweekly employees, enter the first day of the pay period for which the job record is to be effective.
    ✷ 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 not 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.
    ✷ If no date is entered for the Personnel Date, this field will be defaulted to the Jobs Effective Date upon applying the EPAF.
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	8	80
.75	6	60
.50	4	40
.25	2	20

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

16. Review **Time Entry Method** and change if appropriate.
    - ◇ Remove – Do not select Remove as the Time Entry Method field must be populated.
    - ◇ Payroll Time Entry – Do not select Payroll Time Entry.
    - ◇ Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.).
    - ◇ Department Time Entry with Approvals – Used by OSU-CHS only.
    - ◇ Third Party with Approvals – TimePro, AiM, Kronos, etc.
17. Enter the new value for:
    - ⊙ **Title**
18. 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.
19. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
    ✷ Chart (COA) MUST be X for the OSU System.
    ✷ 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.
20. 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. Enter the pay period end date when the employee will stop working in this job.
21. Enter the **Personnel Date** if the job termination (end job action) is retroactive.
    ✷ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes. Enter the last day the employee should work in this job.
22. 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.
23. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
    ✷ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
24. In Comment box, enter notes with sufficient detail for 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.

ADD A JOB RECORD – 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) in MM/DD/YYYY format.
4. Select **Approval Category *Additional Hourly Job no end date, ADDJBH***.
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. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   ✷ 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. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
    ✷ 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.

FTE	Hours/ Day	Hours/ Pay
1.0	8	80
.75	6	60
.50	4	40
.25	2	20

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

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.
15. Review **Time Entry Method** and change if appropriate.
    - Remove – Do <u>not</u> select Remove as the Time Entry Method field must be populated.
    - Payroll Time Entry – Enter this value for Monthly Non-Exempt staff.
    - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.) or the employee is paid monthly.
    - Department Time Entry with Approvals – Used by OSU-CHS only.
    - Third Party with Approvals – TimePro, AiM, Kronos, etc.
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 E 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 annual / sick leave. 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) <u>MUST</u> be X for the OSU System.
    ✷ 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.
    ✷ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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, ADDJHE***.
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. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   ✳ 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. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
    ✳ 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 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	8	80
.75	6	60
.50	4	40
.25	2	20

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

15. Review **Time Entry Method** and change if appropriate.
    - ◈ Remove – Do <u>not</u> select Remove as the Time Entry Method field must be populated.
    - ◈ Payroll Time Entry – Enter this value for Monthly Non-Exempt staff.
    - ◈ Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.) or the employee is paid monthly.
    - ◈ Department Time Entry with Approvals – Used by OSU-CHS only.
    - ◈ Third Party with Approvals – TimePro, AiM, Kronos, etc.
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 E 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 annual / sick leave. 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) <u>MUST</u> be X for the OSU System.
    ✷ 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. For biweekly employees, enter the last day of the pay period for which the terminate job record should be effective, and enter the actual last day of work as the Personnel Date.
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.
    * A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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, ADDJBS***.
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** 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	8	173.33
.75	6	130.00
.50	4	86.67
.25	2	43.33

* 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 E 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 annual / sick leave. 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. 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 X for the OSU System.
    * 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. Use the termination date – the last day the employee is scheduled to work in this position.

22. Enter the **Personnel Date**.
    * This date does not 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.
    * A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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 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, ADJBS2***.
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**.
    - 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 not select Terminated for this approval category. Use a termination approval category.

14. Select the **Job Change Reason** 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	8	173.33
.75	6	130.00
.50	4	86.67
.25	2	43.33

✷ 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 E 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 annual / sick leave. 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. 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 X for the OSU System.
    - ✷ 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.

✱ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

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 – 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 no end date, ADJBWS***.
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. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   - ✳ 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. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
    - ✳ 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** from the dropdown box.

FTE	Hours/ Day	Hours/ Pay
1.0	8	80
.75	6	60
.50	4	40
.25	2	20

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

✷ 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.
15. Review **Time Entry Method** and change if appropriate.
    - Remove – Do not select Remove as the Time Entry Method field must be populated.
    - Payroll Time Entry – Do not select Payroll Time Entry.
    - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.).
    - Department Time Entry with Approvals – Used by OSU-CHS only.
    - Third Party with Approvals – TimePro, AiM, Kronos, etc.
16. Enter the new value for:
    - **Title**
17. 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.
18. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
    ✷ Chart (COA) MUST be X for the OSU System.
    ✷ 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.
    ✷ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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.

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,*** ADJBWE
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. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   - ✷ 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. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
    - ✷ 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** 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.

      ✷ Please note that the hourly rate <u>is not</u> proportionate to the FTE. The Regular Rate should be equivalent to the true hourly rate regardless of FTE. If the FTE of the job is adjusted, the hourly rate should not change. This applies to both monthly non-exempt and bi-weekly non-exempt jobs.
    - **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	8	80
.75	6	60
.50	4	40
.25	2	20

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

15. Review **Time Entry Method** and change if appropriate.
    - Remove – Do <u>not</u> select Remove as the Time Entry Method field must be populated.
    - Payroll Time Entry – Do <u>not</u> select Payroll Time Entry.
    - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.).
    - Department Time Entry with Approvals – Used by OSU-CHS only.
    - Third Party with Approvals – TimePro, AiM, Kronos, etc.
16. Enter the new value for:
    - **Title**
17. 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.
18. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
    ✷ Chart (COA) <u>MUST</u> be X for the OSU System.
    ✷ 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. Enter the last day of the pay period when the employee will stop working within this position.
20. Enter the **Personnel Date** if the job termination (end job action) is retroactive.
    ✷ 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 the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
    ✷ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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.

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, CHGJBH***.
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
    - 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:
    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	8	80
.75	6	60
.50	4	40
.25	2	20

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

14. Review **Time Entry Method** and change if appropriate. This field will most likely not need to be changed for an existing job.

- ◇ Remove – Do not select Remove as the Time Entry Method field must be populated.
- ◇ Payroll Time Entry – Enter this value for Monthly Non-Exempt staff.
- ◇
- ◇ Employee Time Entry via Web – Banner time entry method.
- ◇ Department Time Entry with Approvals – Used by OSU-CHS only.
- ◇ Third Party with Approvals – TimePro, AiM, Kronos, etc.

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 E for a list of Employee Classes with defaults and acceptable overrides.
16. If the Contract Type from step 10 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 annual / sick leave. 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.
17. Review the current value and enter the new value for any change to:
    - ⊙ **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 X for the OSU System.

    ✱ 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.

    ✱ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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 – 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, CHJBS***.
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:
    f. **Annual Salary / Contract Amount** – Employee's actual annual salary.
    g. **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.
    h. **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.
    i. **FTE** – Full-Time Equivalent. (* Must be 1.0 or less)

FTE	Hours/ Day	Hours/ Pay
1.0	8	173.33
.75	6	130.00
.50	4	86.67
.25	2	43.33

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

j. **Hours Per Day** – Number of hours employee will work per day.

k. **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.

l. **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 E for a list of Employee Classes with defaults and acceptable overrides.

15. If the Contract Type from step 10 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 annual / sick leave. 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.

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 X for the OSU System.

✱ 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.

✱ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

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 – 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, CHJBWS***.
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. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   ✷ 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.

FTE	Hours/ Day	Hours/ Pay
1.0	8	80
.75	6	60
.50	4	40
.25	2	20

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

14. Review **Time Entry Method** and change if appropriate. This field will most likely not need to be changed for an existing job.
    - Remove – Do <u>not</u> select Remove as the Time Entry Method field must be populated.
    - Payroll Time Entry – Do <u>not</u> select Payroll Time Entry.
    - Employee Time Entry via Web – Banner time entry method.
    - Department Time Entry with Approvals – Used by OSU-CHS only.
    - Third Party with Approvals – TimePro, AiM, Kronos, etc.
15. Review the current value and enter the new value for any change to:
    - **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) <u>MUST</u> be X for the OSU System.
    - 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.
    - A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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 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 Hourly Job no end date, REJBH***.
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. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   * 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	8	80
.75	6	60
.50	4	40
.25	2	20

* 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 E for a list of Employee Classes with defaults and acceptable overrides.
14. If the Contract Type from step 10 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 annual / sick leave. 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.
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 X for the OSU System.
    * 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.
    * A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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, REJBH2***.
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. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   ✳ 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:

FTE	Hours/ Day	Hours/ Pay
1.0	8	80
.75	6	60
.50	4	40
.25	2	20

✷ 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 E for a list of Employee Classes with defaults and acceptable overrides.
15. If the Contract Type from step 10 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 annual / sick leave. 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.
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 X for the OSU System.
    ✷ 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. For biweekly employees, enter the last day of the pay period for which the terminate job record should be effective, and enter the actual last day of work as the Personnel Date.
20. Enter the **Personnel Date**.
    ✷ This date does not 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 not select Remove as the Job Status field must be populated.
    - Active – Do not 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.

* A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

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, REJBS***.
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	8	173.33
.75	6	130.00
.50	4	86.67
.25	2	43.33

✳ 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 E for a list of Employee Classes with defaults and acceptable overrides.
15. If the Contract Type from step 10 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 annual / sick leave. 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.
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 X for the OSU System.

    ✳ 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 not 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 not select Remove as the Job Status field must be populated.
    - Active – Do not 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.
    ✷ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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 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 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, REJBS2***.
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	8	173.3<u>3</u>
.75	6	130.00
.50	4	86.6<u>7</u>
.25	2	43.3<u>3</u>

✷ 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 E 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 annual / sick leave. 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) <u>MUST</u> be X for the OSU System.
    - ✷ 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.
    - ✷ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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 no end date,** REJWS
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. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   ✷ 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	8	80
.75	6	60
.50	4	40
.25	2	20

✷ 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 X for the OSU System.
    * 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.
    * A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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 with END DATE**, REJWSE
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. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   ✷ 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	8	80
.75	6	60
.50	4	40
.25	2	20

✷ 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 X for the OSU System.
    * 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.
    * For biweekly employees, enter the last day of the pay period for which the terminate job record should be effective, and enter the actual last day of work as the Personnel Date.
16. Enter the **Personnel Date** if the job termination (end job action) is retroactive.
    * This date does not 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.
    * A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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, GLABR***.
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 X for the OSU System.
   * 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.
    * A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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, TERMJB***.
   * 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 for salaried employees 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.) For biweekly employees, enter the last day of the pay period for which the terminate job record should be effective, and enter the actual last day of work as the Personnel Date.
   * 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.
    * A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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, TERME***.
   * Do NOT select this approval category for an employee who is retiring – use Terminate Job Record Only, TERMJB.
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 for salaried employees 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.) For biweekly employees, enter the last day of the pay period for which the terminate job record should be effective, and enter the actual last day of work as the Personnel Date.
   * 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. Review the **Termination Date** (defaulted to Query Date) and change if appropriate.
    * 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.
    * For biweekly employees, the last day of the pay period for which the terminate job record should be effective is used as the Jobs Effective Date in the Terminate/End Pay Job Record section. Therefore, the Last Work Date may be a date prior to the Jobs Effective Date entered in the Terminate/End Pay Job Record section.
    * If there are questions regarding the Last Work Date due to the use of paid leave, please contact your HR Consultant for assistance.
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.
    ✱ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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.

EXCEPTION TO NORMAL PAY – CREATE A NEW ENP JOB

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 found at https://payroll.okstate.edu/schedules-deadlines, 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.)

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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. Complete the ENP form found at https://payroll.okstate.edu/guides-forms and attach the appropriate documentation.
4. Select ***Exception to Normal Pay Create New Job, ENPNEW***.
   ✷ 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. Complete the ENP form found at https://payroll.okstate.edu/guides-forms 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
ENPPP	Practice Plan	131	Professional Payment Plan	Used by OSU-CHS – Practice Plan payments

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

    ✷ Select "JM, OSU Monthly" for the regular monthly payroll or "JX, OSU Supplemental" for the supplemental payroll. (Only select JM or JX – 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 X for the OSU System.
    - 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 MUST 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 MUST be 08/31/YYYY.)
19. Enter the **Personnel Date**.
    - This date does not 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.
    - A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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.

EXCEPTION TO NORMAL PAY – REACTIVATE AN EXISTING ENP JOB

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 found at https://payroll.okstate.edu/schedules-deadlines, 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. Complete the ENP form found at https://payroll.okstate.edu/guides-forms and attach the appropriate documentation.
4. Select ***Exception to Normal Pay Reactivate Existing ENP Job, ENPRJB***.
   ✷ 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. Complete the ENP form found at https://payroll.okstate.edu/guides-forms 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
ENPPP	Practice Plan	131	Professional Payment Plan	Used by OSU-CHS – Practice Plan payments

11. Review the **Payroll ID** (defaulted to JM, OSU Monthly) and use the dropdown box to change if appropriate.

✷ Select "JM, OSU Monthly" for the regular monthly payroll or "JX, OSU Supplemental" for the supplemental payroll. (Only select JM or JX – 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 173.33 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 X for the OSU System.

    ✷ 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 MUST 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 MUST be 08/31/YYYY.)
17. Enter the **Personnel Date**.
    * This date does not 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.
    * A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
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.

TRANSFER – EMPLOYEE TRANSFERRING TO AN HOURLY JOB WITH NO END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > Transfer EPAF Contact List, and open the Excel file.
   ✷ The Transfer EPAF Contact List will be used to determine the User Name to be entered in the Routing Queue for the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU).
   ✷ Make a note of the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from, or leave the list open on your computer so you can refer back to it for Step 28.
2. Select New EPAF.
3. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✷ Use % as the wildcard for searches.
4. 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).
5. Select **Approval Category *Transfer to Hourly Job no end date, TRNJHN***.
6. 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 job 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, TERMJB 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.
7. Click on Go.
8. 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.
9. 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.
10. 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.)
11. Click on **Go**.
    ✷ Do NOT select Next Approval Type a second time.
12. 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.
13. 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 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.

14. 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.
15. 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).
16. 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**
      ✳ Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
    - **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 biweekly job to another 1.0 FTE biweekly 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.
17. 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).
18. 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 17.

19. 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.
20. 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.
21. 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
22. 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).
23. 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	8	80
.75	6	60
.50	4	40
.25	2	20

✷ Hours per day and hours per pay should be

24. Review the **Time Entry Method** and change if appropriate.
    - Remove – Do not select Remove as the Time Entry Method field must be populated.
    - Payroll Time Entry – Enter this value for Monthly Non-Exempt staff.
    - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.) or the employee is paid monthly.
    - Department Time Entry with Approvals – Used by OSU-CHS only.
    - Third Party with Approvals – TimePro, AiM, Kronos, etc.
25. 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 E for a list of Employee Classes with defaults and acceptable overrides.
26. If the Contract Type from step 20 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 annual / sick leave. 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.

27. Enter the new value for:
    - **Title**
28. 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.
29. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.

    ✷ Chart (COA) MUST be X for the OSU System.

    ✷ 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.
30. Review the Routing Queue and use the magnifying glass to change or add User Name(s) as appropriate.

    ✷ The Transfer EPAF must be approved by both the department the employee is transferring from and the department the employee is transferring to. Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU is for the job the employee is transferring from. Approval Level 10 – (DEPTHD) Department Head is for the job the employee is transferring to.

    ✷ Refer back to Step 1 (and the Transfer EPAF Contact List) for the User Name to be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU. Enter the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from. Only User Names found on the Transfer EPAF Contact List may be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU.

    ✷ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements. For Transfer EPAFs, the Originator may not be able to set up a default Routing Queue unless a majority of transfers are from one common College / Division.
31. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
32. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
33. 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.

    ✷ The Transfer EPAF will not move forward in the routing process until it has been approved by the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU) AND the department the employee is transferring to (Approval Level 10 – (DEPTHD) Department Head).

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > Transfer EPAF Contact List, and open the Excel file.
   ✷ The Transfer EPAF Contact List will be used to determine the User Name to be entered in the Routing Queue for the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU).
   ✷ Make a note of the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from, or leave the list open on your computer so you can refer back to it for Step 31.
2. Select New EPAF.
3. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✷ Use % as the wildcard for searches.
4. 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).
5. Select **Approval Category *Transfer to Hourly Job with END DATE, TRNJHE***.
6. 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 job 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, TERMJB 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.
7. Click on Go.
8. 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.
9. 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.
10. 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.)
11. Click on **Go**.
    ✷ Do NOT select Next Approval Type a second time.
12. 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, Update Labor Distribution Information, and Terminate/End Pay Transfer Job Record Only) is for the job the employee is transferring to.
13. 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 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.

14. 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.
15. 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).
16. 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**
      ✷ Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
    - **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 biweekly job to another 1.0 FTE biweekly 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.
17. 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).
18. 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 17.

19. 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.

20. 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.

21. 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

22. 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).

23. 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	8	80
.75	6	60
.50	4	40
.25	2	20

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

24. Review the **Time Entry Method** and change if appropriate.
    - Remove – Do not select Remove as the Time Entry Method field must be populated.
    - Payroll Time Entry –Enter this value if the employee is a Monthly Non-exempt staff
    - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.) or the employee is paid monthly.
    - Department Time Entry with Approvals – Used by OSU-CHS only.
    - Third Party with Approvals – TimePro, AiM, Kronos, etc.

25. 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 E for a list of Employee Classes with defaults and acceptable overrides.

26. If the Contract Type from step 20 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 annual / sick leave. 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.

27. Enter the new value for:
    - **Title**
28. 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.
29. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
    * Chart (COA) MUST be X for the OSU System.
    * 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.
30. 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. For biweekly employees, enter the last day of the pay period for which the terminate job record should be effective, and enter the actual last day of work as the Personnel Date.
31. Enter the **Personnel Date.**
    * This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
32. 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.
33. Review the Routing Queue and use the magnifying glass to change or add User Name(s) as appropriate.
    * The Transfer EPAF must be approved by both the department the employee is transferring from and the department the employee is transferring to. Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU is for the job the employee is transferring from. Approval Level 10 – (DEPTHD) Department Head is for the job the employee is transferring to.
    * Refer back to Step 1 (and the Transfer EPAF Contact List) for the User Name to be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU. Enter the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from. Only User Names found on the Transfer EPAF Contact List may be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU.
    * A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements. For Transfer EPAFs, the Originator may not be able to set up a default Routing Queue unless a majority of transfers are from one common College / Division.
34. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
35. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
36. 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.
    * The Transfer EPAF will not move forward in the routing process until it has been approved by the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU) AND the department the employee is transferring to (Approval Level 10 – (DEPTHD) Department Head).

TRANSFER – EMPLOYEE TRANSFERRING TO A SALARIED JOB WITH NO END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > Transfer EPAF Contact List, and open the Excel file.
   * The Transfer EPAF Contact List will be used to determine the User Name to be entered in the Routing Queue for the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU).
   * Make a note of the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from, or leave the list open on your computer so you can refer back to it for Step 26.
2. Select New EPAF.
3. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   * Use % as the wildcard for searches.
4. 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).
5. Select **Approval Category** ***Transfer to a Salaried Job no end date, TRNJSN***.
6. 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 job 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, TERMJB 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.
7. Click on Go.
8. 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.
9. 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.
10. 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.)
11. Click on **Go**.
    * Do NOT select Next Approval Type a second time.
12. 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 Salaried Job, and Update Labor Distribution Information) is for the job the employee is transferring to.
13. 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 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.

14. 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.
15. 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).
16. 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**
      ✷ Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
    - **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.
17. 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).
18. 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 17.

19. 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.
20. 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.
21. 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
22. 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).
23. 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) MUST be entered.
   - **Timesheet Organization** – Department timesheet organization number.

FTE	Hours/ Day	Hours/ Pay
1.0	8	173.33
.75	6	130.00
.50	4	86.67
.25	2	43.33

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

24. 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 E for a list of Employee Classes with defaults and acceptable overrides.
25. If the Contract Type from step 20 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 annual / sick leave. 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.

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 X for the OSU System.
    * 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.
    * The Transfer EPAF must be approved by both the department the employee is transferring from and the department the employee is transferring to. Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU is for the job the employee is transferring from. Approval Level 10 – (DEPTHD) Department Head is for the job the employee is transferring to.
    * Refer back to Step 1 (and the Transfer EPAF Contact List) for the User Name to be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU. Enter the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from. Only User Names found on the Transfer EPAF Contact List may be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU.
    * A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements. For Transfer EPAFs, the Originator may not be able to set up a default Routing Queue unless a majority of transfers are from one common College / Division.
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.
    * The Transfer EPAF will not move forward in the routing process until it has been approved by the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU) AND the department the employee is transferring to (Approval Level 10 – (DEPTHD) Department Head).

TRANSFER – EMPLOYEE TRANSFERRING TO A SALARIED JOB WITH END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > Transfer EPAF Contact List, and open the Excel file.
   ✷ The Transfer EPAF Contact List will be used to determine the User Name to be entered in the Routing Queue for the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU).
   ✷ Make a note of the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from, or leave the list open on your computer so you can refer back to it for Step 30.
2. Select New EPAF.
3. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   ✷ Use % as the wildcard for searches.
4. 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).
5. Select **Approval Category *Transfer to a Salaried Job with END DATE, TRNJSE***.
6. 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 job 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, TERMJB 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.
7. Click on Go.
8. 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.
9. 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.
10. 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.)
11. Click on **Go**.
    ✷ Do NOT select Next Approval Type a second time.
12. 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 Salaried Job, Update Labor Distribution Information, and Terminate/End Pay Transfer Job Record Only) is for the job the employee is transferring to.
13. 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 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.

14. 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.
15. 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).
16. 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**
      * Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
    - **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.
17. 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).
18. 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 17.

19. 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.
20. 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.
21. 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
22. 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).
23. 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	8	173.3<u>3</u>
.75	6	130.00
.50	4	86.6<u>7</u>
.25	2	43.3<u>3</u>

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

24. 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 E for a list of Employee Classes with defaults and acceptable overrides.
25. If the Contract Type from step 20 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 annual / sick leave. 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.

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 X for the OSU System.
    ✳ 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. 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 **Job Status** (defaulted to Terminated) and use the dropdown box to change if appropriate.
    - Remove – Do not 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
33. Review the Routing Queue and use the magnifying glass to change or add User Name(s) as appropriate.
    ✳ The Transfer EPAF must be approved by both the department the employee is transferring from and the department the employee is transferring to. Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU is for the job the employee is transferring from. Approval Level 10 – (DEPTHD) Department Head is for the job the employee is transferring to.
    ✳ Refer back to Step 1 (and the Transfer EPAF Contact List) for the User Name to be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU. Enter the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from. Only User Names found on the Transfer EPAF Contact List may be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU.
    ✳ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements. For Transfer EPAFs, the Originator may not be able to set up a default Routing Queue unless a majority of transfers are from one common College / Division.
34. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
35. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
36. 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.

* The Transfer EPAF will not move forward in the routing process until it has been approved by the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU) AND the department the employee is transferring to (Approval Level 10 – (DEPTHD) Department Head).

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 > Transfer EPAF Contact List, and open the Excel file.
   * The Transfer EPAF Contact List will be used to determine the User Name to be entered in the Routing Queue for the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU).
   * Make a note of the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from, or leave the list open on your computer so you can refer back to it for Step 28.
2. Select New EPAF.
3. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   * Use % as the wildcard for searches.
4. 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).
5. Select **Approval Category Transfer to Work Study Job no end date**, TRNJWN
6. 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 job 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, TERMJB 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.
7. Click on Go.
8. 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.
9. 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.
10. 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.)
11. Click on **Go**.
    * Do NOT select Next Approval Type a second time.
12. 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.
13. 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 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.

14. 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.
15. 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).
16. 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**
      ✷ Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
    - **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.
17. 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).
18. 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 17.

19. 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.
20. 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.
21. 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
22. 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).
23. 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	8	80
.75	6	60
.50	4	40
.25	2	20

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

24. Review the **Time Entry Method** and change if appropriate.
   - Remove – Do not select Remove as the Time Entry Method field must be populated.
   - Payroll Time Entry – Do not select Payroll Time Entry.
   - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.).
   - Department Time Entry with Approvals – Used by OSU-CHS only.
   - Third Party with Approvals – TimePro, AiM, Kronos, etc.
25. Enter the new value for:
   - **Title**
26. 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.
27. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
   ✱ Chart (COA) MUST be X for the OSU System.
   ✱ 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.

28. Review the Routing Queue and use the magnifying glass to change or add User Name(s) as appropriate.
    ✷ The Transfer EPAF must be approved by both the department the employee is transferring from and the department the employee is transferring to. Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU is for the job the employee is transferring from. Approval Level 10 – (DEPTHD) Department Head is for the job the employee is transferring to.
    ✷ Refer back to Step 1 (and the Transfer EPAF Contact List) for the User Name to be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU. Enter the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from. Only User Names found on the Transfer EPAF Contact List may be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU.
    ✷ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements. For Transfer EPAFs, the Originator may not be able to set up a default Routing Queue unless a majority of transfers are from one common College / Division.
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.
    ✷ The Transfer EPAF will not move forward in the routing process until it has been approved by the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU) AND the department the employee is transferring to (Approval Level 10 – (DEPTHD) Department Head).

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

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > Transfer EPAF Contact List, and open the Excel file.
   * The Transfer EPAF Contact List will be used to determine the User Name to be entered in the Routing Queue for the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU).
   * Make a note of the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from, or leave the list open on your computer so you can refer back to it for Step 28.
2. Select New EPAF.
3. Enter the employee's Banner **ID** or use the magnifying glass to search by the employee's name.
   * Use % as the wildcard for searches.
4. 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).
5. Select **Approval Category Transfer to Work Study Job with END DATE**, TRNJWE
6. 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 job 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, TERMJB 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.
7. Click on Go.
8. 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.
9. 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.
10. 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.)
11. Click on **Go**.
    * Do NOT select Next Approval Type a second time.
12. 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.
13. 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 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.

14. 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.

15. 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).

16. 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**

      ✳ Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
    - **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.

17. 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).

18. 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 17.

19. 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.

20. 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.

21. 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

22. 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).

23. 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	8	80
.75	6	60
.50	4	40
.25	2	20

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

24. Review the **Time Entry Method** and change if appropriate.
    - Remove – Do not select Remove as the Time Entry Method field must be populated.
    - Payroll Time Entry – Do not select Payroll Time Entry.
    - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.).
    - Department Time Entry with Approvals – Used by OSU-CHS only.
    - Third Party with Approvals – TimePro, AiM, Kronos, etc.

25. Enter the new value for:
    - **Title**

26. 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.

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

    ✷ Chart (COA) MUST be X for the OSU System.

    ✷ 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.

32. 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.
33. Enter the **Personnel Date** if the end date of the job the employee is transferring to is retroactive.
    * This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
34. 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.
28. Review the Routing Queue and use the magnifying glass to change or add User Name(s) as appropriate.
    * The Transfer EPAF must be approved by both the department the employee is transferring from and the department the employee is transferring to. Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU is for the job the employee is transferring from. Approval Level 10 – (DEPTHD) Department Head is for the job the employee is transferring to.
    * Refer back to Step 1 (and the Transfer EPAF Contact List) for the User Name to be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU. Enter the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from. Only User Names found on the Transfer EPAF Contact List may be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU.
    * A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements. For Transfer EPAFs, the Originator may not be able to set up a default Routing Queue unless a majority of transfers are from one common College / Division.
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.
    * The Transfer EPAF will not move forward in the routing process until it has been approved by the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU) AND the department the employee is transferring to (Approval Level 10 – (DEPTHD) Department Head).

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 OSU
		1REH	Rehire	Employee has been separated from OSU and is returning
		1REIN	Reinstate	Reinstate primary job for active employee after break in service. 8/20/24
		IRET	Employee Retirement	Employee starting retirement (Used by Payroll)
SA	Salary Adjustment	CADJ	Salary Adjustment	NOT FOR USE FOR OSU-STILLWATER STAFF – Salary adjustments for other classifications and locations 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%

XP	Extra Pay	XCHNG	Change Additive Pay	Change is being made to additive pay
		XNEW	Enter New Additive Pay	Additive pay is beginning
		XSTOP	Stop Additive Pay	Additive pay is stopping
CH	Other Change	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
		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
ENPPP	Practice Plan	131	Professional Payment Plan	Used by OSU-CHS – Practice Plan payments

APPENDIX C – ENP DATE CHART – EXAMPLE FOR ENPNEW [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 <u>FOLLOWING</u> month, unless the 12th is a non-working day.

				Exception to Normal Pay Add New Job			**Exception to Normal Pay Payment Information**		**Update Labor Distribution Information**	**Terminate / End Pay Job Record Only**	
Pay Period		Pay Date [2]	Query Date	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 ENPRJB; however, the first section on the EPAP will be titled Exception to Normal Pay <u>*Reactivate Existing*</u> 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
Summer Appointment	Begins with S
Faculty Endowment	F1
Department / College / Division Administrative Additive	D1

APPENDIX E – 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
OSU	1A	OSU Gen Univ Faculty	1F	OSU Faculty Sick Lv	1E	OSU Ex/AdminProf 1
OSU	1A	OSU Gen Univ Faculty	1F	OSU Faculty Sick Lv	XX	Ineligible for Leave
OSU	1E	OSU Gen Univ Exec-Allowncs	1E	OSU Ex/AdminProf 1	1P	OSU AdminProf 2
OSU	1E	OSU Gen Univ Exec-Allowncs	1E	OSU Ex/AdminProf 1	XX	Ineligible for Leave
OSU	1F	OSU Gen Univ Exec-No Allowncs	1E	OSU Ex/AdminProf 1	XX	Ineligible for Leave
OSU	1G	OSU Gen Univ AdminProf	1P	OSU AdminProf 2	1E	OSU Ex/AdminProf 1
OSU	1G	OSU Gen Univ AdminProf	1P	OSU AdminProf 2	XX	Ineligible for Leave
OSU	1J	OSU Gen Univ Monthly Staff	1S	OSU Monthly Staff	1E	OSU Ex/AdminProf 1
OSU	1J	OSU Gen Univ Monthly Staff	1S	OSU Monthly Staff	XX	Ineligible for Leave
OSU	1J	OSU Gen Univ Monthly Staff	1S	OSU Monthly Staff	3P	OSU Staff-AP 2 Accrl GF
OSU	1J	OSU Gen Univ Monthly Staff	1S	OSU Monthly Staff	3F	OSU NonExempt Fellow Sick Lv
OSU	1J	OSU Gen Univ Monthly Staff	1S	OSU Monthly Staff	3E	OSU Staff-AP 1 Accrl GF
OSU	1J	OSU Gen Univ Monthly Staff	1S	OSU Monthly Staff	1P	OSU AdminProf 2
OSU	1N	OSU Gen Univ Mo Temp	XX	Ineligible for Leave	1X	OSU Monthly Temp Nonexempt
OSU	1Q	OSU Gen Univ Bw Staff (1.5OT)	2S	OSU Bw Staff	2E	OSU Bw AdminProf 1
OSU	1Q	OSU Gen Univ Bw Staff (1.5OT)	2S	OSU Bw Staff	XX	Ineligible for Leave
OSU	1Q	OSU Gen Univ Bw Staff (1.5OT)	2S	OSU Bw Staff	2P	OSU Bw AdminProf 2
OSU	1Q	OSU Gen Univ Bw Staff (1.5OT)	2S	OSU Bw Staff	2F	OSU Bw Faculty Sick Lv
OSU	2A	OSU DASNR Faculty	1F	OSU Faculty Sick Lv	1E	OSU Ex/AdminProf 1
OSU	2F	OSU DASNR Exec-No Allowances	1E	OSU Ex/AdminProf 1	XX	Ineligible for Leave
OSU	2G	OSU DASNR AdminProf	1P	OSU AdminProf 2	1E	OSU Ex/AdminProf 1
OSU	2J	OSU DASNR Mo Staff	1S	OSU Monthly Staff	1E	OSU Ex/AdminProf 1
OSU	2J	OSU DASNR Mo Staff	1S	OSU Monthly Staff	1P	OSU AdminProf 2
OSU	2J	OSU DASNR Mo Staff	1S	OSU Monthly Staff	3E	OSU Staff-AP 1 Accrl GF

OSU	2J	OSU DASNR Mo Staff	1S	OSU Monthly Staff	3F	OSU NonExempt Fellow Sick Lv
OSU	2J	OSU DASNR Mo Staff	1S	OSU Monthly Staff	3P	OSU Staff-AP 2 Accrl GF
OSU	2J	OSU DASNR Mo Staff	1S	OSU Monthly Staff	XX	Ineligible for Leave
OSU	2Q	OSU DASNR Bw Staff (1.5OT)	2S	OSU Bw Staff	2E	OSU Bw AdminProf 1
OSU	2Q	OSU DASNR Bw Staff (1.5OT)	2S	OSU Bw Staff	2F	OSU Bw Faculty Sick Lv
OSU	2Q	OSU DASNR Bw Staff (1.5OT)	2S	OSU Bw Staff	2P	OSU Bw AdminProf 2
OSU	4A	OSU-IT Faculty	1E	OSU Ex/AdminProf 1	XX	Ineligible for Leave
OSU	4G	OSU-IT AdminProf	1P	OSU AdminProf 2	1E	OSU Ex/AdminProf 1
OSU	4G	OSU-IT AdminProf	1P	OSU AdminProf 2	XX	Ineligible for Leave
OSU	4J	OSU-IT Mo Staff	1S	OSU Monthly Staff	1E	OSU Ex/AdminProf 1
OSU	4J	OSU-IT Mo Staff	1S	OSU Monthly Staff	1P	OSU AdminProf 2
OSU	4J	OSU-IT Mo Staff	1S	OSU Monthly Staff	3E	OSU Staff-AP 1 Accrl GF
OSU	4J	OSU-IT Mo Staff	1S	OSU Monthly Staff	3P	OSU Staff-AP 2 Accrl GF
OSU	4Q	OSU-IT Bw Staff (1.5OT)	2S	OSU Bw Staff	2E	OSU Bw AdminProf 1
OSU	4Q	OSU-IT Bw Staff (1.5OT)	2S	OSU Bw Staff	2P	OSU Bw AdminProf 2
OSU	5G	CVHS AdminProf	1P	OSU AdminProf 2	1E	OSU Ex/AdminProf 1
OSU	5J	CVHS Mo Staff	1S	OSU Monthly Staff	1P	OSU AdminProf 2
OSU	5J	CVHS Mo Staff	1S	OSU Monthly Staff	3E	OSU Staff-AP 1 Accrl GF
OSU	5J	CVHS Mo Staff	1S	OSU Monthly Staff	3F	OSU NonExempt Fellow Sick Lv
OSU	5J	CVHS Mo Staff	1S	OSU Monthly Staff	1E	OSU Ex/AdminProf 1
OSU	5J	CVHS Mo Staff	1S	OSU Monthly Staff	3P	OSU Staff-AP 2 Accrl GF
OSU	5Q	CVHS Bw Staff (1.5OT)	2S	OSU Bw Staff	2E	OSU Bw AdminProf 1
OSU	5Q	CVHS Bw Staff (1.5OT)	2S	OSU Bw Staff	2F	OSU Bw Faculty Sick Lv
OSU	5Q	CVHS Bw Staff (1.5OT)	2S	OSU Bw Staff	2P	OSU Bw AdminProf 2
OSU	5S	CVHS Bw Temp (1.5OT)	XX	Ineligible for Leave	2S	OSU Bw Staff
OSU	6A	OSU-OKC Faculty	1F	OSU Faculty Sick Lv	6F	OSU-OKC Faculty Lv
OSU	6F	OSU-OKC Exec-No Allowances	1E	OSU Ex/AdminProf 1	XX	Ineligible for Leave
OSU	6J	OSU-OKC Mo Staff	1S	OSU Monthly Staff	1E	OSU Ex/AdminProf 1
OSU	6J	OSU-OKC Mo Staff	1S	OSU Monthly Staff	1P	OSU AdminProf 2
OSU	6J	OSU-OKC Mo Staff	1S	OSU Monthly Staff	3P	OSU Staff-AP 2 Accrl GF
OSU	6J	OSU-OKC Mo Staff	1S	OSU Monthly Staff	3E	OSU Staff-AP 1 Accrl GF
OSU	6Q	OSU-OKC Bw Staff (1.5OT)	2S	OSU Bw Staff	2P	OSU Bw AdminProf 2

OSU	6Q	OSU-OKC Bw Staff (1.5OT)	2S	OSU Bw Staff	2E	OSU Bw AdminProf 1
OSU	7A	CHS Faculty	1E	OSU Ex/AdminProf 1	XX	Ineligible for Leave
OSU	7B	Chs NonRet Faculty	1F	OSU Faculty Sick Lv	1E	OSU Ex/AdminProf 1
OSU	7B	Chs NonRet Faculty	1F	OSU Faculty Sick Lv	XX	Ineligible for Leave
OSU	7F	CHS Exec-No Allowances	1E	OSU Ex/AdminProf 1	XX	Ineligible for Leave
OSU	7G	CHS AdminProf	1P	OSU AdminProf 2	1E	OSU Ex/AdminProf 1
OSU	7G	CHS AdminProf	1P	OSU AdminProf 2	XX	Ineligible for Leave
OSU	7J	CHS Mo Staff	1S	OSU Monthly Staff	3E	OSU Staff-AP 1 Accrl GF
OSU	7J	CHS Mo Staff	1S	OSU Monthly Staff	1P	OSU AdminProf 2
OSU	7J	CHS Mo Staff	1S	OSU Monthly Staff	1E	OSU Ex/AdminProf 1
OSU	7J	CHS Mo Staff	1S	OSU Monthly Staff	3P	OSU Staff-AP 2 Accrl GF
OSU	7Q	CHS Bw Staff (1.5OT)	2S	OSU Bw Staff	2P	OSU Bw AdminProf 2
OSU	7Q	CHS Bw Staff (1.5OT)	2S	OSU Bw Staff	2E	OSU Bw AdminProf 1
OSU	8G	OSU-Tulsa AdminProf	1P	OSU AdminProf 2	1E	OSU Ex/AdminProf 1
OSU	8J	OSU-Tulsa Mo Staff	1S	OSU Monthly Staff	1F	OSU Faculty Sick Lv
OSU	8J	OSU-Tulsa Mo Staff	1S	OSU Monthly Staff	1E	OSU Ex/AdminProf 1
OSU	8J	OSU-Tulsa Mo Staff	1S	OSU Monthly Staff	1P	OSU AdminProf 2
OSU	8J	OSU-Tulsa Mo Staff	1S	OSU Monthly Staff	XX	Ineligible for Leave
OSU	8J	OSU-Tulsa Mo Staff	1S	OSU Monthly Staff	3E	OSU Staff-AP 1 Accrl GF
OSU	8J	OSU-Tulsa Mo Staff	1S	OSU Monthly Staff	3P	OSU Staff-AP 2 Accrl GF
OSU	8Q	OSU-Tulsa Bw Staff (1.5OT)	2S	OSU Bw Staff	2E	OSU Bw AdminProf 1
OSU	8Q	OSU-Tulsa Bw Staff (1.5OT)	2S	OSU Bw Staff	2P	OSU Bw AdminProf 2

Updates:

Date	Description of Update
10-13-2017	Step-by-step instructions were added for ENP approval categories. Appendix B (ENP Job Change Reason Codes and Earnings Codes Chart) and Appendix C (ENP Date Chart) were added.
10-13-2017	For New Employee – Hourly and Work Study approval categories, the Current Hire Date in the Create/Change PEAEMPL Record section is no longer defaulted to the Query Date. Default wording was removed. Additional wording was added to all New Employee approval categories about the Current Hire Date.
10-13-2017	For New Employee and Add a Job approval categories, information was added about the Suffix field. Appendix D (Suffix – Type of Payment Chart) was added.
10-18-2017	Step-by-step instructions were added for an Hourly Employee with an End Date (New Employee, Add a Job, and Reactivate a Job approval categories).
11-01-2017	Step-by-step instructions were added for the Reactivate a Job Record – Work Study approval category.
11-01-2017	Additional wording was added to instruct the originator to check for specific instructions and/or requirements a College / Division may have related to routing.
02-21-2018	For the Terminate – Job Record and Employee approval category, Last Work Date was added, and the Termination Date and Last Work Date default to the Query Date.
03-06-2018	Step-by-step instructions were added for Transfer approval categories.
04-05-2018	For all Transfer EPAFs, Approval Level for (DHOUTJ) Dept Head Transfer Out OSU (for the job the employee is transferring from) was changed from 10 to 12 to address issues caused when the same person is entered for the job the employee is transferring from and the job the employee is transferring to.
09-21-2018	Appendix A was updated for new termination Job Change Reason Codes. ENP EPAFs (Create a New Job and Reactivate an Existing Job) were changed to require a paper ENP form be submitted for overpayments (negative amounts). For Transfer EPAFs, information was added for the one exception when the Job Begin Date will not be the same as the Jobs Effective Date (employee previously in position and transferring back to existing position using the same position suffix value).
10-17-2018	Approval category names / descriptions were updated. Job Leave Category and Accrue Leave fields were added for hourly and salaried EPAFs to address problems with secondary jobs not accruing leave and/or employees who accrue at a rate different than the default rate. Appendix E (Employee Class Codes with Leave Accrual Defaults and Acceptable Overrides) was added. Not Enterable fields (including Contract Type, Employee Class Code, and Benefit Category) were added to EPAFs with End Job Record sections. Wording was changed from "monthly" employee to "salaried" employee. Job Change Reason Codes CADJ and LWCR were added.
7-20-19	Added information regarding new Work Study EPAFs with End Dates. Added comments regarding use of HOURLY EPAFs for processing Monthly Non-Exempt staff and not Salaried EPAFs.
10-11-19	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.

ELECTRONIC PERSONNEL ACTION FORMS (EPAFs) – TERM DEFINITIONS AND TIPS

Effective Date – The date this action will affect payroll.

✷ The Effective Date must be after the Last Paid Date.

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

✷ The Personnel Date should be the Form I-9 date for all new hires.

✷ The **Personnel Date** field is used to record the actual date. The **Effective Date** field is used to control the payment.

✷ For changes, the Effective Date and Personnel Date will be the same unless the personnel action is retroactive. If the personnel action is retroactive, the Personnel Date is the date the action should have been effective.

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 exempt 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.

Contract Type – Indicates the type of assignment and controls benefits.

- ▣ 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.

✷ After selecting the approval category, click on the All Jobs button to see other jobs the employee may have.

	To Be Entered								Banner Calculated	
Examples *[Note – The dates used are examples only. Use the actual dates that are applicable for your situation.]*	Effective Date	Personnel Date	Terminate Job Record Effective Date	Leave w/out Pay w/ Benefits Effective Date	Factor	Pays	Annual Salary / Contract Amount	Regular Rate	Monthly Salary	Biweekly Salary
Faculty member on a 9 month contract **[Approval Category: Monthly with end date]** Annual Salary / Contract Amount: $90,000 Month pay is to begin: September 2017 Actual date to start work: 08-21-2017	09-01-2017	08-21-2017		06-01-2018	9	9 [1]	$90,000		$10,000	
Faculty member on a 10 month contract **[Approval Category: Monthly with end date]** Annual Salary / Contract Amount: $90,000 Month pay is to begin: September 2017 Actual date to start work: 08-21-2017	09-01-2017	08-21-2017		07-01-2018	10	10 [1]	$90,000		$9,000	
Faculty member on a 9 month contract **[Approval Category: Monthly with end date]** Annual Salary / Contract Amount: $90,000 Month pay is to begin: August 2017 Actual date to start work: 08-21-2017	08-01-2017	08-21-2017		05-01-2018	9	9 [1]	$90,000		$10,000	
First year faculty member on a 9 month contract – salary is <u>not</u> to be paid in 9 equal monthly installments and will be prorated in August and May **[Approval Category: Monthly with end date]** Annual Salary / Contract Amount: $90,000 Month pay is to begin: August 2017 Actual date to start work: 08-21-2017 Last Date Scheduled to work: 05-11-2018	08-21-2017	08-21-2017		05-12-2018	9	9	$90,000		$10,000 [2]	
Adjunct faculty member for fall semester to be paid $4,000 in 4 equal monthly installments **[Approval Category: Monthly with end date]** Annual Salary / Contract Amount: $4,000 Month pay is to begin: September 2017 Month pay is to end: December 2017 Actual date to start work: 08-21-2017	09-01-2017	08-21-2017	12-31-2017		4	4	$4,000		$1,000	
Adjunct faculty member for fall semester to be paid $4,000 in 5 equal monthly installments **[Approval Category: Monthly with end date]** Annual Salary / Contract Amount: $4,000 Month pay is to begin: August 2017 Month pay is to end: December 2017 Actual date to start work: 08-21-2017	08-01-2017	08-21-2017	12-31-2017		5	5	$4,000		$800	

	To Be Entered								Banner Calculated	
Examples *[Note – The dates used are examples only. Use the actual dates that are applicable for your situation.]*	Effective Date	Personnel Date	Terminate Job Record Effective Date	Leave w/out Pay w/ Benefits Effective Date	Factor	Pays	Annual Salary / Contract Amount	Regular Rate	Monthly Salary	Biweekly Salary
Adjunct faculty member for fall semester to be paid $4,000 for 08-15-2017 to 12-31-2017 with August prorated and full months for September through December **[Approval Category: Monthly with end date]** Annual Salary / Contract Amount: $4,380.95 Month pay is to begin: August 2017 Month pay is to end: December 2017 Actual date to start work: 08-15-2017	08-15-2017	08-15-2017	12-31-2017		5	5	$4,380.95 [3]		$876.19 [3]	
Graduate teaching assistant to be paid in 9 equal monthly installments **[Approval Category: Monthly with end date]** Annual Salary / Contract Amount: $1,000 Month pay is to begin: September 2017 Actual date to start work: 08-21-2017	09-01-2017	08-21-2017	05-31-2018		1 [4]	1 [4]	$1,000 [4]		$1,000	
Graduate teaching assistant to be paid $1,550 monthly for the fall semester **[Approval Category: Monthly with end date]** Annual Salary / Contract Amount: $1,550 Actual date to start work: 08-21-2017 Last Date Scheduled to work: 12-15-2017	08-21-2017	08-21-2017	12-15-2017		1 [4]	1 [4]	$1,550 [4]		$1,550 [5]	
Graduate research assistant to be paid $1,000 per month – Grant ends April 30, 2018 **[Approval Category: Monthly with end date]** Annual Salary / Contract Amount: $1,000 Actual date to start work: 10-09-2017 Last date scheduled to work: 04-30-2018	10-09-2017	10-09-2017	04-30-2018		1 [4]	1 [4]	$1,000 [4]		$1,000 [6]	
Exempt staff member to be paid $5,000 monthly **[Approval Category: Monthly no end date]** Annual Salary / Contract Amount: $60,000 Actual date to start work: 09-11-2017	09-11-2017	09-11-2017			12	12	$60,000		$5,000 [7]	
Nonexempt staff member to be paid $15 per hour biweekly **[Approval Category: Hourly]** Regular Rate: $15 Actual date to start work: 09-11-2017	09-11-2017	09-11-2017			N/A	N/A		$15		$1,200 [8]

[1] – Payroll Services will update the Pays field if the faculty member completes a deferral agreement.

[2] – Monthly pay for August 2017 will be prorated based on the start date and number of work days in August 2017. Monthly pay for May 2018 will be prorated based on the end date and the number of work days in May 2018.

[3] – Payment will be over 4.565217 months (13/23 days = 0.565217 for August plus September through December). $4,000 / 4.456217 months = $876.19 per month. $876.19 per month x 5 Factor = $4,380.95 Annual Salary (or Contract Amount) to be entered.

August 2017	(4,380.95 / 5) x 13/23 =	$ 495.24
September 2017	4,380.95 / 5 =	876.19
October 2017	4,380.95 / 5 =	876.19
November 2017	4,380.95 / 5 =	876.19
December 2017	4,380.95 / 5 =	876.19
TOTAL TO BE PAID		$4,000.00

[4] – **For Graduate Assistants only**, enter the monthly salary as the Annual Salary / Contract Amount, Factor = 1, and Pays = 1.

[5] – Monthly pay for August 2017 will be prorated based on the start date and number of work days in August 2017. Monthly pay for December 2017 will be prorated based on the end date and the number of work days in December 2017.

[6] – Monthly pay for October 2017 will be prorated based on the start date and the number of work days in October 2017.

[7] – Monthly pay for September 2017 will be prorated based on the start date and the number of work days in September 2017.

[8] – If time sheet reflects 80 hours.

Electronic Personnel Action Form (EPAF)

Approver Reference Guide

OSU Human Resources 6/2016

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Introduction

Banner HR, Oklahoma State University's Human Resources Information System (HRIS), allows designated end users to electronically process standard employment actions such as hiring or making personnel changes via an electronic Personnel Action Form (EPAF). The EPAF allows an originator to input all actions into an online form, which will then be sent automatically to the next designated approver in the routing queue until it is ultimately applied electronically to the appropriate Banner screen(s).

The EPAF system provides an end user with the ability to check the status of EPAFs at any time locating exactly where the EPAF is in the approval routing queue.

Prior to using the EPAF system, you should become familiar with employee class codes, your department/college home organization number(s), positions number(s), timekeeping categories, as well as the funding source for the personnel actions in which you will be originating or approving.

Important Note:

Oklahoma State University has chosen to use the Self Service Center as its EPAF processing forum. Since the Internet-native Banner (INB) is also available, users may receive notice upon log-in that indicates that there are transactions to be reviewed and/or approved and "Do you want to go there now?" - Always Click ***NO*** *to this question.*

Approver (and/or Proxy) Responsibilities

Each EPAF has an established default approval routing queue. As an approver and/or proxy, you must understand your role and responsibility as it relates to EPAF processing. As an authorized EPAF approver, you are expected to demonstrate full awareness of the importance of maintaining prudent fiscal operations in an effort to ensure the effective management of departmental financial resources as well as compliance with other applicable University policies.

The mandatory approval routing queue levels have been assigned with the minimum approvals needed from an audit perspective. While other University departments may review and approve the EPAF prior to your receiving it in your queue, your role as approver and/or proxy is to ensure that personnel data and other information contained in the EPAF is accurate and you approve the action being taken. Your approval will be electronically date and time stamped on the EPAF record and will be deemed as your electronic signature as part of the University's signatory authority for audit purposes.

Logging In and Getting Started

To access the EPAFs, you must log in to the Self Service Banner (SSB).

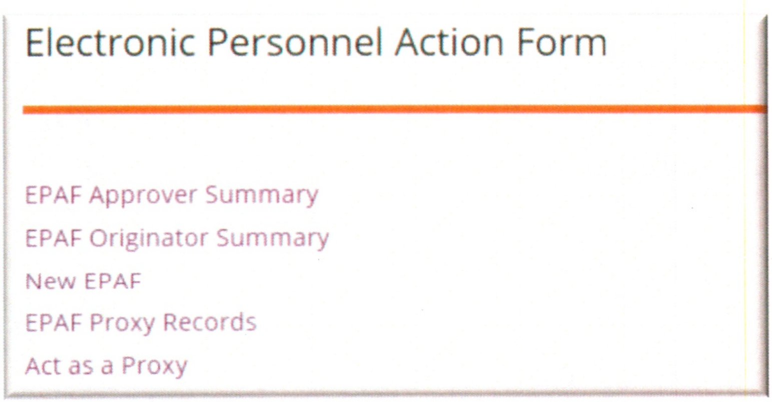
1. Go to http://my.okstate.edu/ and log in with your O-Key Credentials.

2. Under the Applications Menu, click on the Self Service link.

3. The EPAF menu is found under the **Employee** Tab.

4. Select the **Electronic Personnel Action Forms** link from the menu.

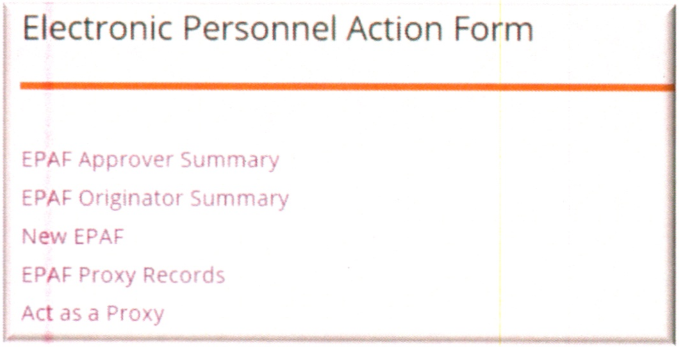
5. The following links will be available from the EPAF menu:



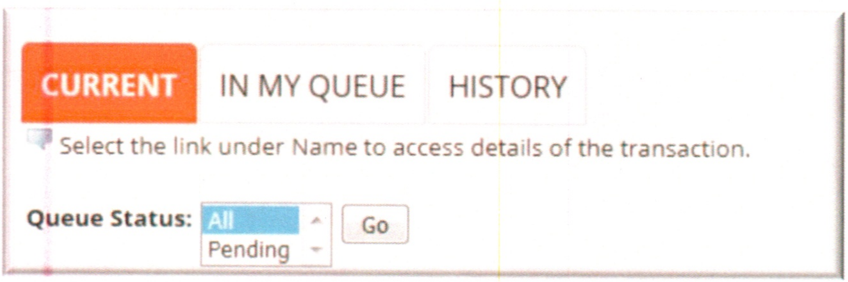
Viewing EPAF Transactions

This electronic process within SSB will provide you the ability to view EPAFs submitted by originators. Your EPAF menu options will vary depending on your user roles and access levels.

1. Select the **EPAF Approval Summary**



2. The **Current** tab will show transactions that need your immediate attention. In the Queue Status field, select **Pending** and then click **Go** to review transactions that are pending your approval.



3. Click on the employee's name to review the EPAF. You may also review comments made by the EPAF originator or other approvers by clicking on the **Comments** link. A **Warning** link will also be available if there are warning notifications.

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Runner, Road B. Stu Wkr, 703549-00	A20020619	387	Hourly - Add Job Record	May 23, 2016	May 23, 2016	Approve	☐	Comments

EPAF Approver Levels and Approval Routing

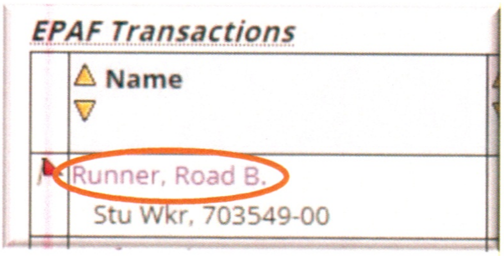
Each EPAF Approval Category is routed for review by several approvers before updating employee records. It is mandatory to include some institutional approvers. Mandatory approver routing will be pre-populated and included by default for each approval category. Additional approvers may be added to the routing queue for all or some of the EPAF approval categories depending upon the specific personnel action and required approvals for the College/Division. Originators must select the individual user name for each approver level when submitting the EPAF.

- 5 – (DIVAG) Division of Ag Review
- 10 – (DEPTHD) Department Head Review
- 20 – (FWS) Federal Work Study
- 20 - (HRPS) HR – Partner Services
- 20 – (HRADMN) HR – Administration
- 20 – (BENEFT) OSU Benefits
- 20 – (PAYROL) Payroll
- 30 – (GRANTS) Grants and Contracts
- 40 – (DVHEAD) Division Head
- 50 – (ACDAFR) Academic Affairs
- 70 – (BENTEC) Benefits Technical
- 70 – (FACACT) Faculty Actions
- 90 – (APPLY) EPAF Appliers

EPAF Approver Actions

Please be reminded of your responsibility as a designated EPAF approver/proxy. It is incumbent upon you to review the information in the "New Value" column and consider any comments submitted with the EPAF as this may be important information for you to consider before approving this personnel action.

1. Select the transaction you wish to review.

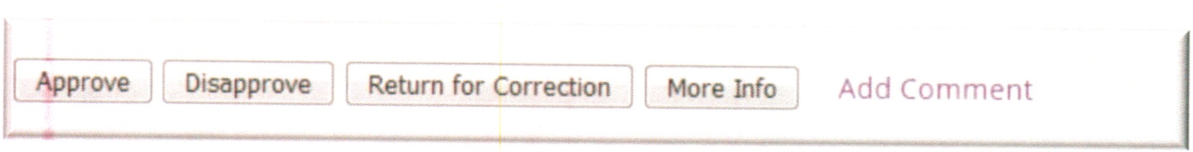


2. Based on the information provided, select the appropriate EPAF action:

   a. **Approve** – Choose this action if you approve and agree to sign off on the EPAF. This action allows the EPAF to move on to the next approver in the routing queue or allows the EPAF to be applied in the Banner system.

   b. **Disapprove** – Choose this action if you do not approve of the EPAF and do not wish to have any further action taken on the transaction. This action may also be chosen if there are errors on the EPAF that cannot be corrected by the originator (e.g. incorrect position number). Please include a comment explaining the reason for disapproval.

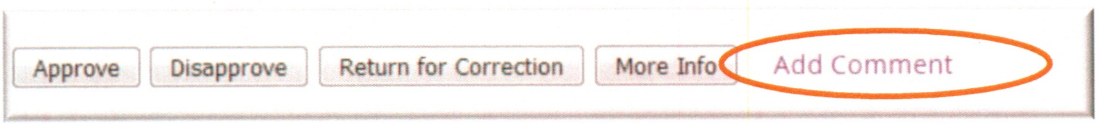
   c. **Return for Correction** – Choose this action if there is an error that needs to be corrected by the originator before the EPAF is applied to the system. Please include a comment explaining what needs to be corrected. Once the corrections have been made and the EPAF has been resubmitted by the originator, the transaction will return to your approval queue.



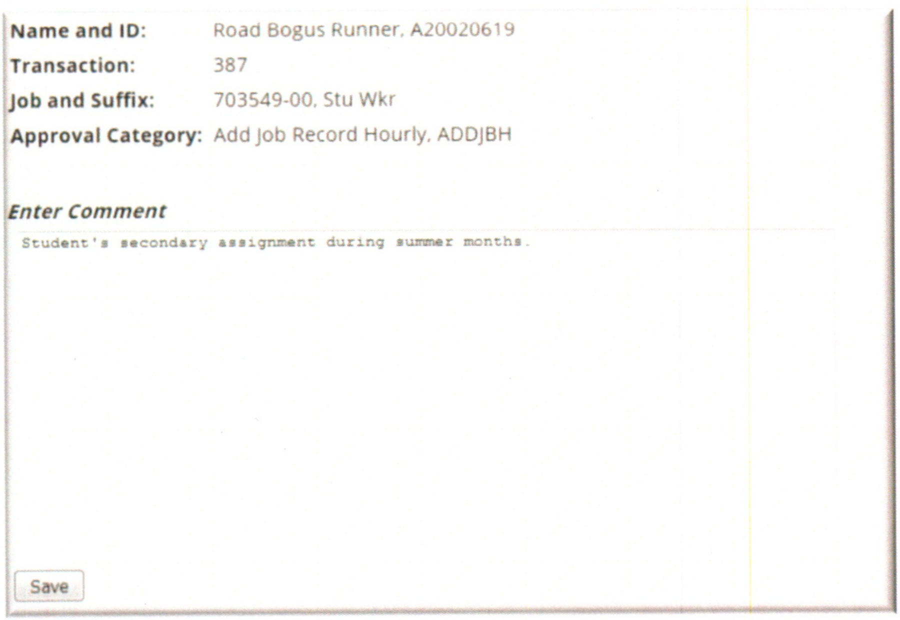
Comments

As an approver (or proxy), you may also add a comment to an EPAF. This can be very helpful to the originator or to the next approver, particularly if the EPAF is disapproved or returned for correction. **Please be aware that comments made on an EPAF will become part of the permanent on-line record, and should be kept professional.**

1. To add a comment, click on the **Add Comment** link.



2. Enter your comments then click SAVE.



3. Click the **EPAF Preview** link at the bottom of the page to return to the EPAF preview.

Once the appropriate Action has been taken, a message will be displayed at the top of the EPAF stating that the transaction has been successfully completed.

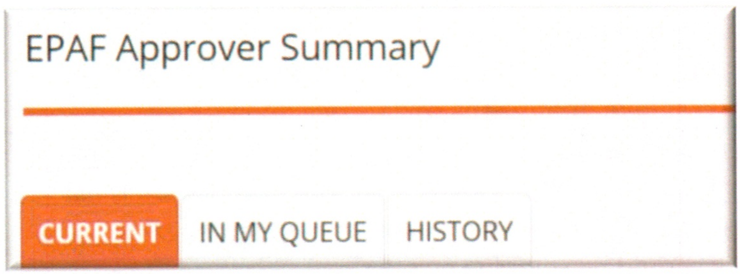
✓ Transaction successfully completed.

Name and ID:	Road Bogus Runner, A20020619	**Job and Suffix:**	703549-00, Stu Wkr
Transaction:	387	**Query Date:**	May 23, 2016
Transaction Status:	Approved	**Last Paid Date:**	
Approval Category:	Hourly - Add Job Record, ADDJBH		

Checking the Status of the EPAF

The EPAF process will provide you with the ability to determine where any EPAF is located in the approval routing queue.

On the Self Service Banner main page, click the Employee tab → Electronic Personnel Action Forms → EPAF Approver Summary.



There are three tabs. **Current**, **In My Queue**, and **History**.

- The Current tab will display EPAFs that require your approval or FYI. You are encouraged to check your Current tab regularly to ensure that all pending EPAFS are submitted in a timely manner.

- The In My Queue tab will display EPAFS for which you have been selected as an approver. These transactions are currently sitting in the originator's or another approval's queue.

- The History tab will display EPAFS that you have approved or acknowledged. There are several transaction status options in this tab (Completed, Approved, Pending, Returned for Correction, Void and Rejected). You are encouraged to check your History tab regularly to determine what action, if any, is necessary to complete the EPAF process. The system stores all submitted EPAFS in this History for twenty-four (24) months.

EPAF Terms & Definitions

AnnSalry/Contract Amt	The employee's actual annual salary. For example, if a faculty member works the spring semester (5 pays, January – May) only and will receive $4,000 per month, the annual salary will be $20,000.
Appliers	The department/individual that will apply the EPAF transaction to Banner.
Approval Category	The Approval Category is the type of EPAF to use for the action.
Approver	The person listed in the EPAF routing queue to take action.
Approval Level	Represents the hierarchy structure of the organization starting from the lowest level that needs to approve an EPAF.
Contract Type	Indicates the type of assignment. **Each employee can only have one primary job.** Any jobs in addition to the primary job must have a secondary contract type. All other supplemental assignments should be selected as overload.
Factor	The number of pay periods between the beginning and end of the assignment are based on the payroll calendar. For example, if the monthly employee's assignment is for the spring semester, the factor will be 5 months. (January – May)
FTE	Describes the Full-Time Equivalent and the percentage of a full-time appointment. An example would be a 100% appointment represents an FTE of 1.0, or a 50% appointment represents an FTE of .50. Do not use percent signs when completing EPAFs. Use the number with decimals. All FTE must be 1 0r less.
FYI	Designee at level who reviews actions, but does not take action or approve.
Hours per day	The number of hours per day the employee will work. This should be reflective of the FTE. For example, 1.0 = 8 hour per day, 0.75 FTE = 6 hours per day, 0.50 FTE = 4 hours per day, 0.25 FTE = 2 hours per day.
Hours per pay	The total number of hours per pay for each job worked. Examples of the most commonly used Hours per Pay used for monthly and bi-weekly are: Monthly paid positions: 1.0 FTE = 173.33 monthly hours per pay 0.75 FTE = 130.00 monthly hours per pay 0.50 FTE = 86.6**7** monthly hours per pay 0.25 FTE = 43.3**3** monthly hours per pay Biweekly paid positions: 1.0 FTE = 80 hours per pay 0.75 FTE = 60 hours per pay 0.50 FTE = 40 hours per pay 0.25 FTE = 20 hours per pay
Job Change Reason	Indicates the reason for the job change or action.

Jobs Begin Date	The date the job assignment begins unless the employee has previously occupied his position. If the employee has been in the position before, this field does not have to be populated.
Job Effective Date	The date this action will affect payroll. If the action is for a future payroll, use the actual date in the future on which this action will be effective. For all job creation actions, this date should be the employee's first day of work. Retroactive actions must be handled on an ENP.
Last Paid Date	Indicates the employee's last paid date. **The effective date cannot be earlier than the last paid date.**
Originator	Creates the EPAF and submits to approver.
Pays	The number of paychecks the employee will receive. A monthly paid employee that works the spring semester and will have a factor of 5 months will receive 5 monthly payments. Ongoing monthly employees will have 12 pays. Hourly employees will have 26 pays.
Personnel Date	This date does not affect pay but serves as an information field for historical, audit or reporting purposes. It is in the job information section of EPAFS and the End Job Assignment section. It should be completed in both sections to indicate when the work actually begins and ends or the actual update/change effective date.
Proxy	Designee who acts on behalf of the approver or applier.
Query Date	The date you want to query the database. This date defaults to today's date. This date can be changed to the past or future so you can see information that is active as of the personnel date (date that the action is effective). When the EPAF is late, and the employee's job is not updated on time, the employee might be underpaid or overpaid, and the department must take additional manual steps to rectify the situation.
Suffix	The position suffix should be 00 in most cases. Unless the employee has multiple assignment under one position number, then the suffix will be 01, 02 and so forth. This two character identifier can either be alpha and/or numeric. These assignments are primarily used for employees that are paid multiple pay rates under one assignment (Rancher's club wait staff, Tutors, etc).
Term Jobs Effective Date	Date the job assignment actually ends.
Term Personnel Date	Actual date the employee leaves the assignment.
Timesheet Orgn	The specific department timesheet organizational number.

EPAF Status Definitions

The Transaction Status is displayed on the Originator Summary and also at the top of each EPAF transaction. The Transaction Status refers to the status of the EPAF transaction itself.

Transaction Statuses	Definition
Waiting	Transaction has been initiated, but not submitted.
Pending	Transaction has been submitted by the initiator and is pending review by an approver.
Approved	Transaction has been approved by an approver(s).
Complete	Transaction has been submitted and approved by all approvers in the routing queue, and applied.
Void	Transaction has been voided.
Disapproved	The EPAF has been disapproved by an Approver.
Partially Completed	Transaction required some fields to be fixed – only part of the transaction can be applied.
Return for Correction	The EPAF was returned to the originator for correction.
Cancelled	Transaction has been cancelled.

The Queue Status is displayed in the routing queue of the EPAF transaction and refers to the status of the EPAF transaction with regards to a specific approver in the approval queue.

Queue Statuses	Definition
Pending	Transaction is pending in the approvers queue
FYI	A person in the approval queue who receives the EPAF action for informational purposes only.
Approved	The transaction has been approved by the current approver
In the queue	Transaction is back in the routing queue waiting for the next approval level.
Void	Transaction was voided
More Information	An approver has requested additional information before the EPAF can proceed.
Acknowledge	An FYI approver has received the EPAF and acknowledged receipt.
Return for Correction	The EPAF was returned to the originator for correction.
Overridden	A superuser has overridden one or more approval level.
Removed from queue	The transaction was removed from the approval queue (superuser)
Applied	All approvals in the routing queue are complete and the changes have been applied to the Banner system.

Searching for an EPAF

1. From the Approver Summary screen, click on the Search link.

2. Every saved and submitted EPAF can be found in the search by entering the appropriate criteria. Enter the name, Banner ID or transaction number. Click Go.

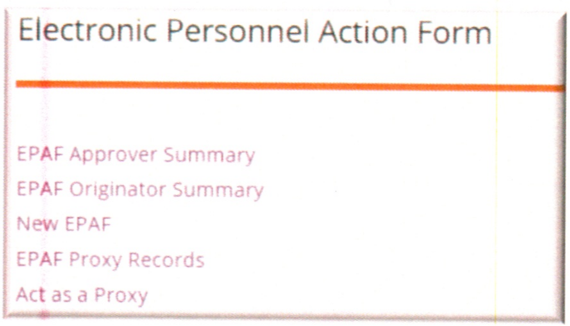
Designating a Proxy Approver

To ensure timely processing of EPAFS, every approver must establish a proxy. This designation allows an approver to authorize other designated individuals to take approval action in the approver's absence.

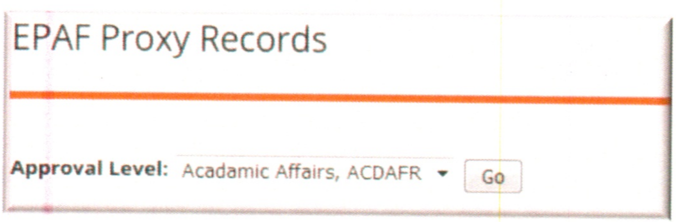
If you, as an approver, are unavailable or planning to be out of the office (or are unexpectedly out of the office) for an extended period of time, please notify your proxy so that pending EPAF transactions do not sit in the queue.

1. Select the Employee tab then **Electronic Personnel Action Forms**.

2. Select **EPAF Proxy Records**.



3. Select the appropriate approval level then click **Go**.



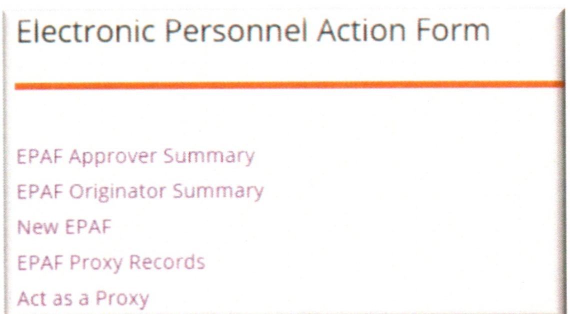
4. Select the appropriate person from the drop down list. Then click **Save**.

Acting as a Proxy

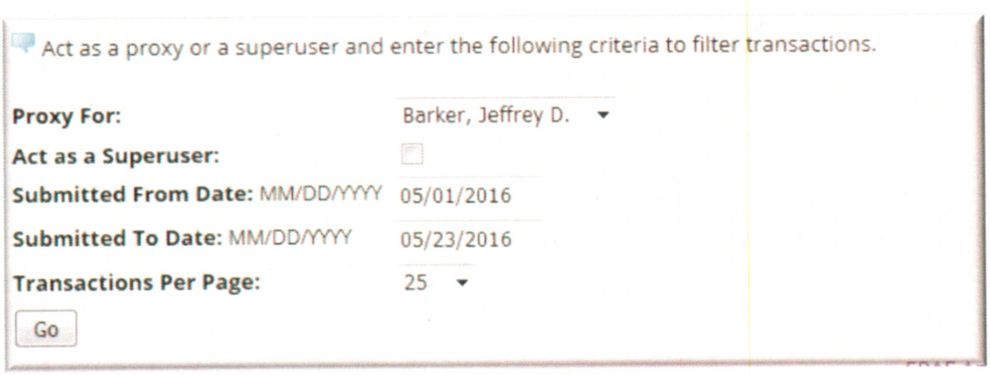
If you are acting as a designated proxy, please follow the guidelines noted below.

1. Select the Employee tab then **Electronic Personnel Action Forms**.

2. Select **Act as a Proxy.**



3. Select the person for whom you are acting as a proxy and the date range for the transactions you wish to view. Click **Go**.



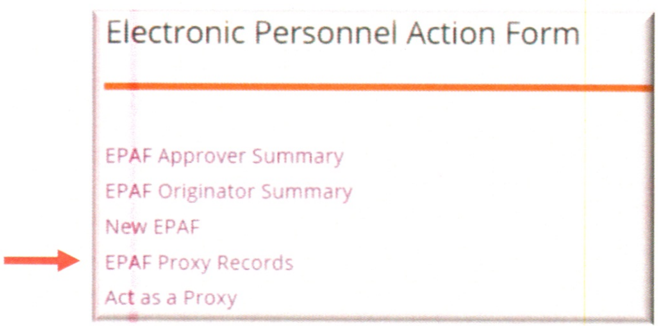
4. The approver summary will display the transactions pending approval for the selected date range. Click on the transaction you wish to review and follow the instructions for EPAF Approver Actions (page 6).

Removing a Proxy Approver Setting

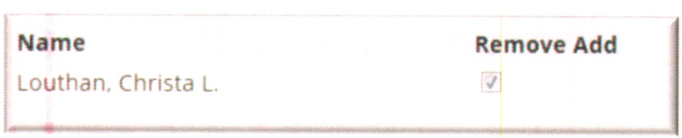
To remove a proxy designation, please follow the guidelines noted below.

1. Select the Employee tab then **Electronic Personnel Action Forms**.

2. Select **EPAF Proxy Records**.



3. Check the box for the proxy you are removing and click **Save**.



Note: *Once this action is completed, the person removed will no longer have access to view transactions designated for your approval in Self Service Banner.*