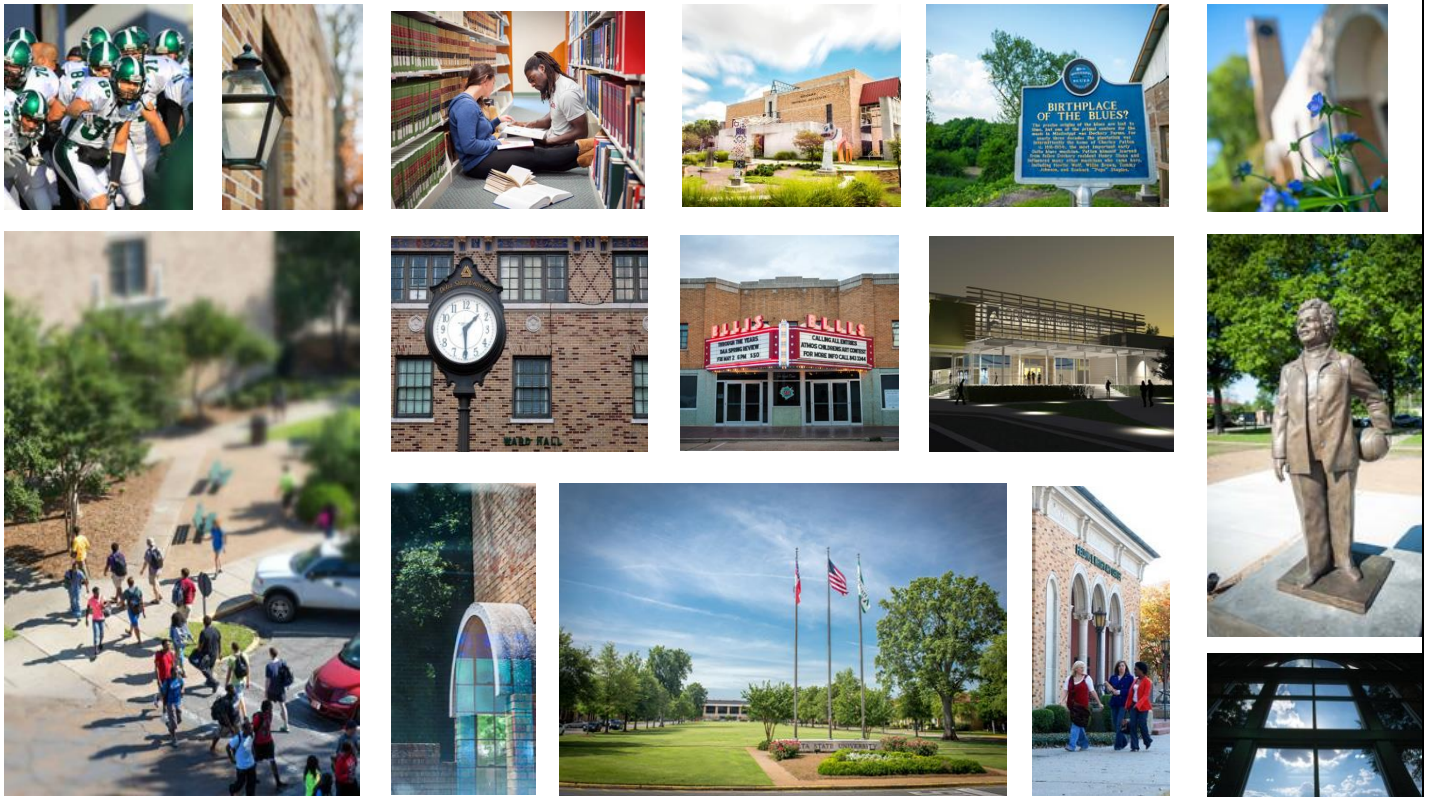


**ELECTRONIC ▪ PERSONNEL ▪ ACTION ▪ FORM (EPAF)**

---

**Banner Human Resources Self Service  
User Manual**



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## INTRODUCTION

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

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

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

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

## EPAF ORIGINATORS

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

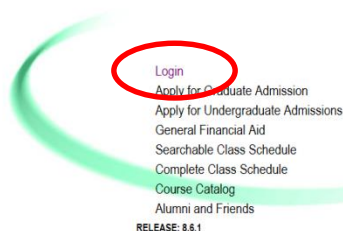
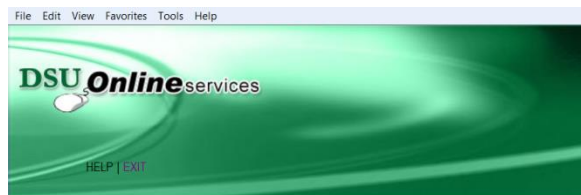
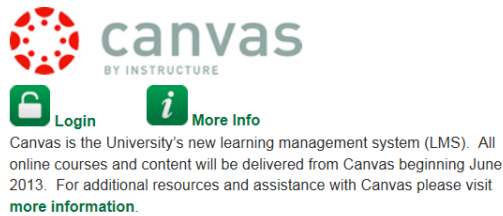
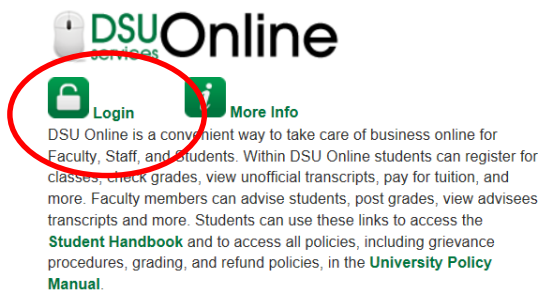
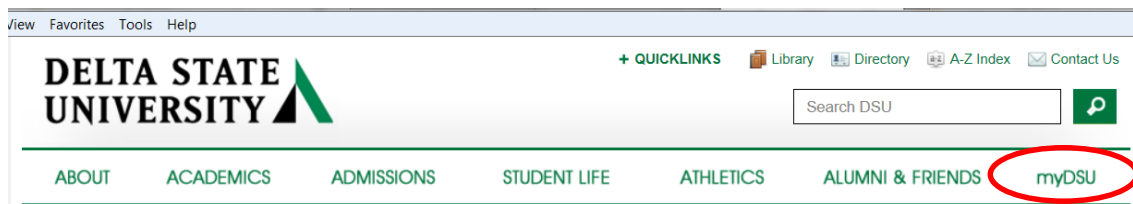
### Accessing EPAF menu in DSU Online Services

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

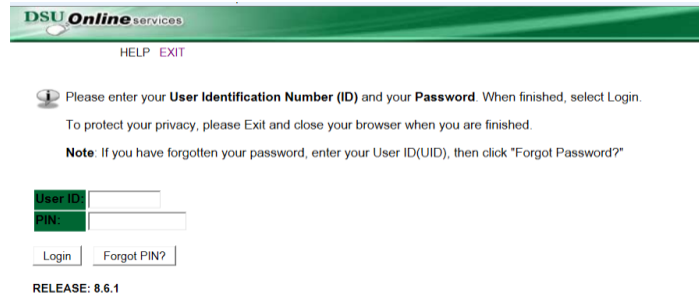
### Accessing Employee Self Service through DSU Online Services

Employee Self Service can be accessed through the DSU website:

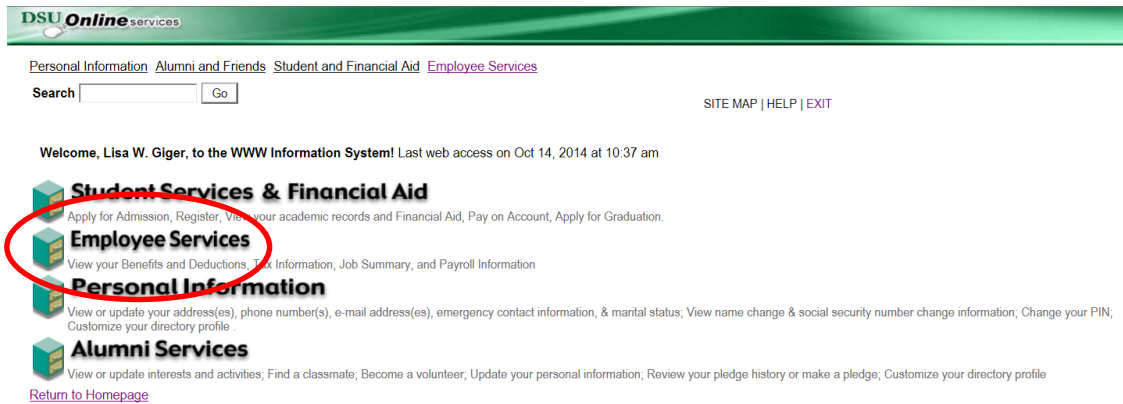
1. Open your internet browser on your computer.
2. Click on myDSU.
3. Click on Login under DSU online services.
4. Click on Login again to gain access to Employee Self Services.



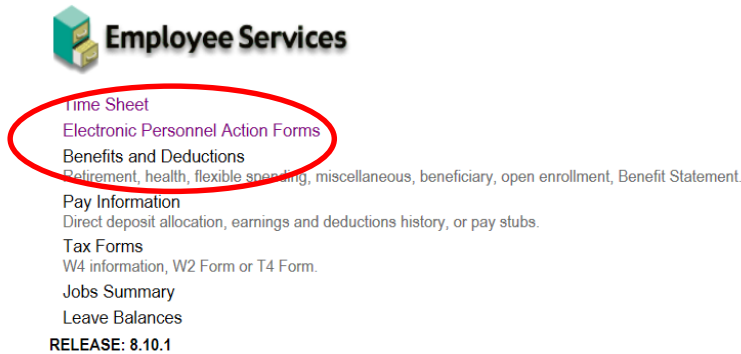
5. Enter your 900# and password.



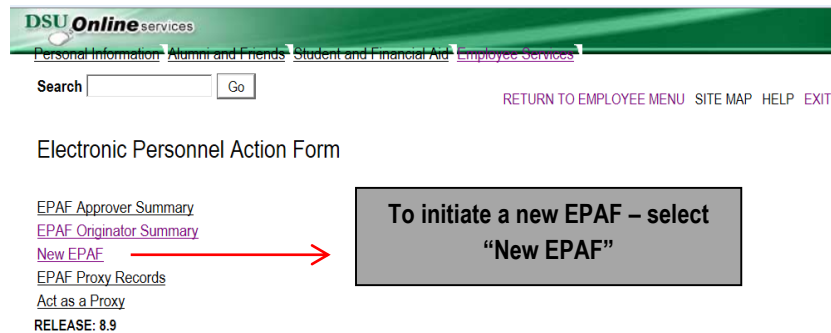
6. Click on Employee Services.



7. Click on Electronic Personnel Action Forms



8. Click on New EPAF



## How to Search for a Person

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

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

DSU Online services

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


Search  Go

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

### New EAPF Person Selection

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

\* - indicates a required field.

ID:  

Query Date: MM/DD/YYYY 10/02/2014

Approval Category: Not Selected

Go

[EAPF Originator Summary](#)

[Return to EAPF Menu](#)

RELEASE: 8.9

### Person Search

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

**Search Criteria**

**Employee**

**Last Name:**

**First Name:**

Or

**ID:**

Or

**SSN/SIN/TIN:**

**Records per Page:** 25

Go

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

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

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

### Person Search

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

**Search Criteria**

Employee:

Last Name:

First Name:

Or

ID:

Or

SSN/SIN/TIN:

Records per Page: 25

### Person Search Results

To choose a person, select a link under ID.

[EPAF Person Search](#)

[Return to EPAF Menu](#)

[Jump to Bottom](#)

| ID                        | Last Name | First Name | Middle Name | Birth Date | Name Type |
|---------------------------|-----------|------------|-------------|------------|-----------|
| <a href="#">900044576</a> | Pagan     | Munel      | D.          |            |           |
| <a href="#">900088104</a> | Pagan     | Juan       | Domingo     |            |           |
| <a href="#">900113195</a> | Pagan     | Derick     | Sean        |            |           |
| <a href="#">900080870</a> | Pagan     | Joseph     |             |            |           |
| <a href="#">900453259</a> | Paganelli | Brenda     |             |            |           |
| <a href="#">900441794</a> | Pagani    | John       | C           |            |           |

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

1 - 6 of 6  
[Return to Top](#)



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

### New EPAF Person Selection

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

\* - indicates a required field.

ID:

Query Date: MM/DD/YYYY:

Approval Category:

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

[EPAF Originator Summary](#)

[Return to EPAF Menu](#)



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

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

DSU Online services

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

Search

EE MENU SITE MAP HELP EXIT

### New EPAF Person Selection

Enter an ID, select the link

\* - indicates a required field.

ID:

Query Date: MM/DD/YYYY

Approval Category:

Select the App

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

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

[Return to EPAF Menu](#)

DSU Online services

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

Search

RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT

### New EPAF Person Selection

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

\* - indicates a required field.

ID:

Query Date: MM/DD/YYYY

Approval Category:

⚠ There are no active jobs based on the Query Date.

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

[Return to EPAF Menu](#)

## Selecting the Applicable Approval Category

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

### DSU EPAFS

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

|    |        |  |  |                 |
|----|--------|--|--|-----------------|
| 17 | D00015 | Job Labor Distribution Change (Academic Affairs)     | To change the fund, org, and/or account to which an employee's salary is charged | Human Resources |
| 18 | D00016 | Job Labor Distribution Change (Non Academic Affairs) | To change the fund, org, and/or account to which an employee's salary is charged | Human Resources |
| 19 | D00022 | Campus Address Change (Academic Affairs)             | To change the campus address of an employee.                                     | Human Resources |
| 20 | D00023 | Campus Address Change (Non Academic Affairs)         | To change the campus address of an employee.                                     | Human Resources |







## How to Enter Routing Queue Manually

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

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

Mary Ruth Phillips in Payroll is the only applier.

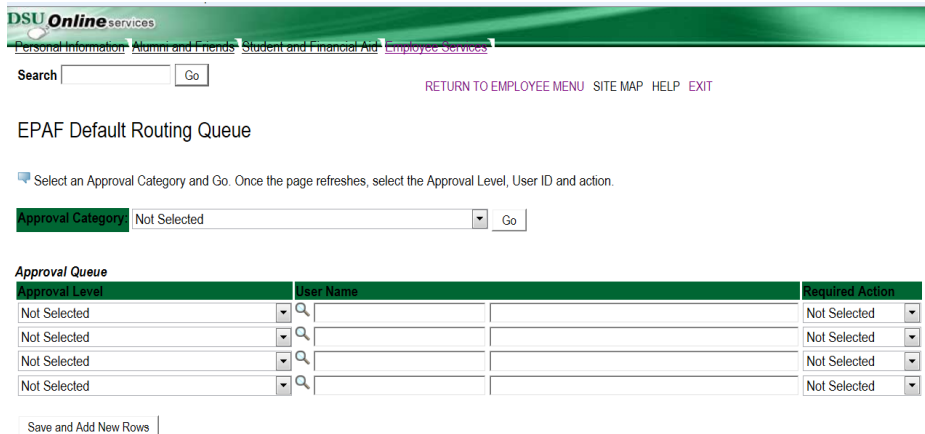
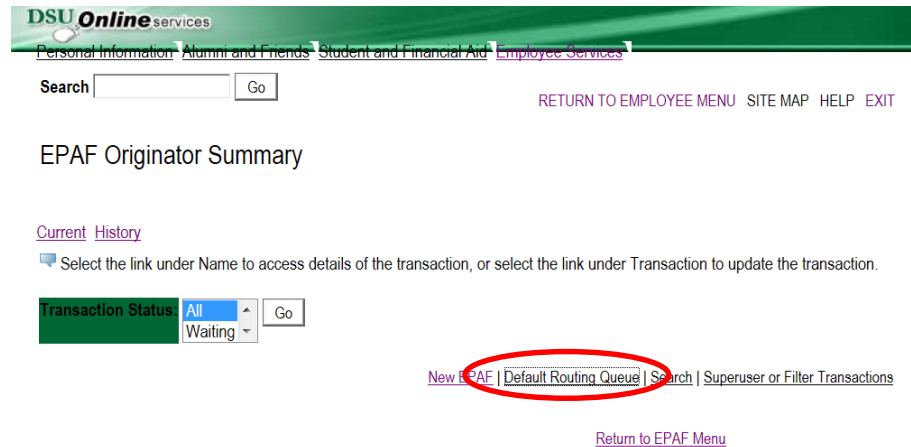
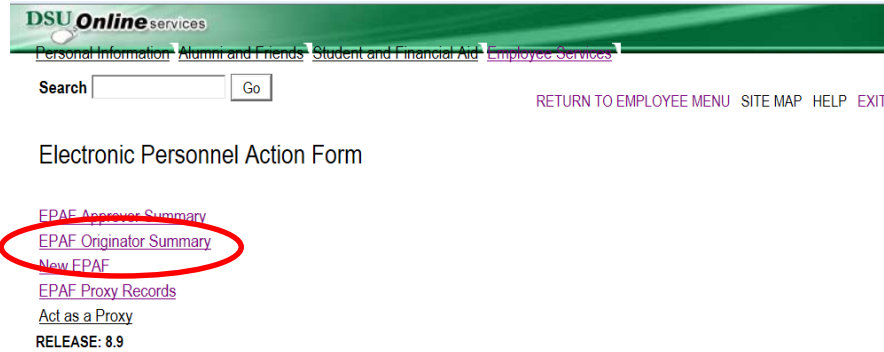
### Routing Queue

| Approval Level  | User Name  | Required Action  | Remove  |
|---|--|------------------|---|
| 90 - (HR) Human Resources                                       |  LGIGER | Lisa Weeks Giger | Approve                                       |
| 99 - (SUPER) Superuser  |  LGIGER | Lisa Weeks Giger | Apply   |
| 5 - (DEPT) Director/Supervisor <input type="button" value="v"/> |         |                  | Not Selected <input type="button" value="v"/> |
| Not Selected <input type="button" value="v"/>                   |         |                  | Not Selected <input type="button" value="v"/> |
| Not Selected <input type="button" value="v"/>                   |         |                  | Not Selected <input type="button" value="v"/> |
| Not Selected <input type="button" value="v"/>                   |         |                  | Not Selected <input type="button" value="v"/> |

# How to Create a Default Routing Queue

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

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



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

EPAF Default Routing Queue

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

| Approval Category | Not Selected   | Go  |                |                 |              |              |              |              |              |              |              |              |
|-------------------|--|---|----------------|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Approval Queue    | <ul style="list-style-type: none"> <li>Not Selected</li> <li>Overload Spring - Current Faculty/Staff, OVERSP</li> <li>Overload - Continuing Education Non Credit, CONTOL</li> <li>Adjunct Rehire, AJREHI</li> <li>Adjunct Rehire Non Credit Continuing Education, AJRECE</li> <li>Adjunct New Hire, AJNEWH</li> <li>Adjunct New Hire Continuing Education, AJNEWC</li> <li>Update Labor Distribution - Academic Affairs, LABOR</li> <li>Update Labor Distribution - Non Academic Affairs, LABOR1</li> <li>Employee Termination from DSU (Staff/Hourly), EMTERM</li> <li>Faculty Termination from DSU, FATERM</li> <li>Salary and Title Change - Staff (Current Position), SALCHS</li> <li>Salary and Title Change - Hourly (Current Position), SALCHH</li> <li>New Employee Biographical and Permanent Address, AEMBIO</li> <li>One Time Pay (Overload Faculty/Staff), 1PAYOL</li> <li>Campus Address Add/Change - Faculty, CAADCH</li> <li>Campus Address Add/Change - Staff, CAADST</li> </ul> | <table border="1"> <thead> <tr> <th>Approval Level</th> <th>Required Action</th> </tr> </thead> <tbody> <tr><td>Not Selected</td><td>Not Selected</td></tr> <tr><td>Not Selected</td><td>Not Selected</td></tr> <tr><td>Not Selected</td><td>Not Selected</td></tr> <tr><td>Not Selected</td><td>Not Selected</td></tr> </tbody> </table> | Approval Level | Required Action | Not Selected | Not Selected | Not Selected | Not Selected | Not Selected | Not Selected | Not Selected | Not Selected |
| Approval Level    | Required Action  |   |                |                 |              |              |              |              |              |              |              |              |
| Not Selected      | Not Selected   |   |                |                 |              |              |              |              |              |              |              |              |
| Not Selected      | Not Selected   |   |                |                 |              |              |              |              |              |              |              |              |
| Not Selected      | Not Selected   |   |                |                 |              |              |              |              |              |              |              |              |
| Not Selected      | Not Selected   |   |                |                 |              |              |              |              |              |              |              |              |

Save and Add New Rows

[Originator Summary](#)

[return to EPAF Menu](#)

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

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

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

EPAF Default Routing Queue

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

Approval Category: Summer School Overload, D00040 Go

| Approval Queue | Approval Level                            | User Name                             | Required Action | Remove                   |
|----------------|---|---------------------------------------|-----------------|--------------------------|
|                | 10 - (CHAIR) Chair                        |                                       | Approve         | <input type="checkbox"/> |
|                | 15 - (DEAN) Dean                          |                                       | Approve         | <input type="checkbox"/> |
|                | 39 - (ACAFF1) Academic Affairs (Hayley)   | HMURRELL<br>Hayley H Murrell          | Approve         | <input type="checkbox"/> |
|                | 40 - (ACDAFF) Academic Affairs            | CBALLARD<br>Cheryl M Ballard          | Approve         | <input type="checkbox"/> |
|                | 45 - (PROVOS) Provost of Academic Affairs | CMCADAMS<br>Charles Alan McAdams      | Approve         | <input type="checkbox"/> |
|                | 50 - (HRFYI) HR FYI                       | SMPHILLIPS<br>Samantha Myers Phillips | FYI             | <input type="checkbox"/> |
|                | 65 - (BUDGET) Budget Office               | BLINDSEY<br>Beverly Coons Lindsey     | Approve         | <input type="checkbox"/> |
|                | 70 - (PAYROL) Payroll FYI (Monthly)       | MPHILLIPS<br>Mary Ruth Phillips       | FYI             | <input type="checkbox"/> |
|                | 75 - (HRDIR) Human Resource Director      | LGIGER<br>Lisa Weeks Giger            | Approve         | <input type="checkbox"/> |
|                | 99 - (SUPER) Superuser                    | MPHILLIPS<br>Mary Ruth Phillips       | Apply           | <input type="checkbox"/> |
|                | Not Selected                              |                                       | Not Selected    | <input type="checkbox"/> |
|                | Not Selected                              |                                       | Not Selected    | <input type="checkbox"/> |
|                | Not Selected                              | Search                                | Not Selected    | <input type="checkbox"/> |
|                | Not Selected                              |                                       | Not Selected    | <input type="checkbox"/> |

Save and Add New Rows


# How to Review the History of Originators Transactions and Their Statuses

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

## New EPAF Person Selection

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

\* - indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category:

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

[Return to EPAF Menu](#)

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

Transaction Status:

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

[Return to EPAF Menu](#)

1 - 2 of 2

[Jump to Bottom](#)

### EPAF Transactions

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

1 - 2 of 2

[Return to Top](#)

\*\*Comments Exist

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

[Return to EPAF Menu](#)

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

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

## EPAF Preview

✔ You are acting as an Originator.

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

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

**Transaction:** 19

**Query Date:** Oct 01, 2014

**Transaction Status:** Waiting

**Last Paid Date:**

**Approval Category:** Update Labor Distribution - Academic Affairs, LABOR

Next 

[Update](#) | [Add Comment](#)

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

| Current                    |       |      |              |         |         |          |          |         |      |         |                      |          |
|----------------------------|-------|------|--------------|---------|---------|----------|----------|---------|------|---------|----------------------|----------|
| Effective Date: 10/01/2014 |       |      |              |         |         |          |          |         |      |         |                      |          |
| COA                        | Index | Fund | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance Override | End Date |
| 1                          |       | 10   | 3006         | 61200   | 0101    |          |          |         |      | 100.00  |                      |          |

### New

| Effective Date: 10/01/2014 |       |      |              |         |         |          |          |         |      |         |                      |          |
|----------------------------|-------|------|--------------|---------|---------|----------|----------|---------|------|---------|----------------------|----------|
| COA                        | Index | Fund | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance Override | End Date |
| 1                          |       | 10   | 0305         | 61200   | 0101    |          |          |         |      | .00     |                      |          |

### Routing Queue

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

### Transaction History


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



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

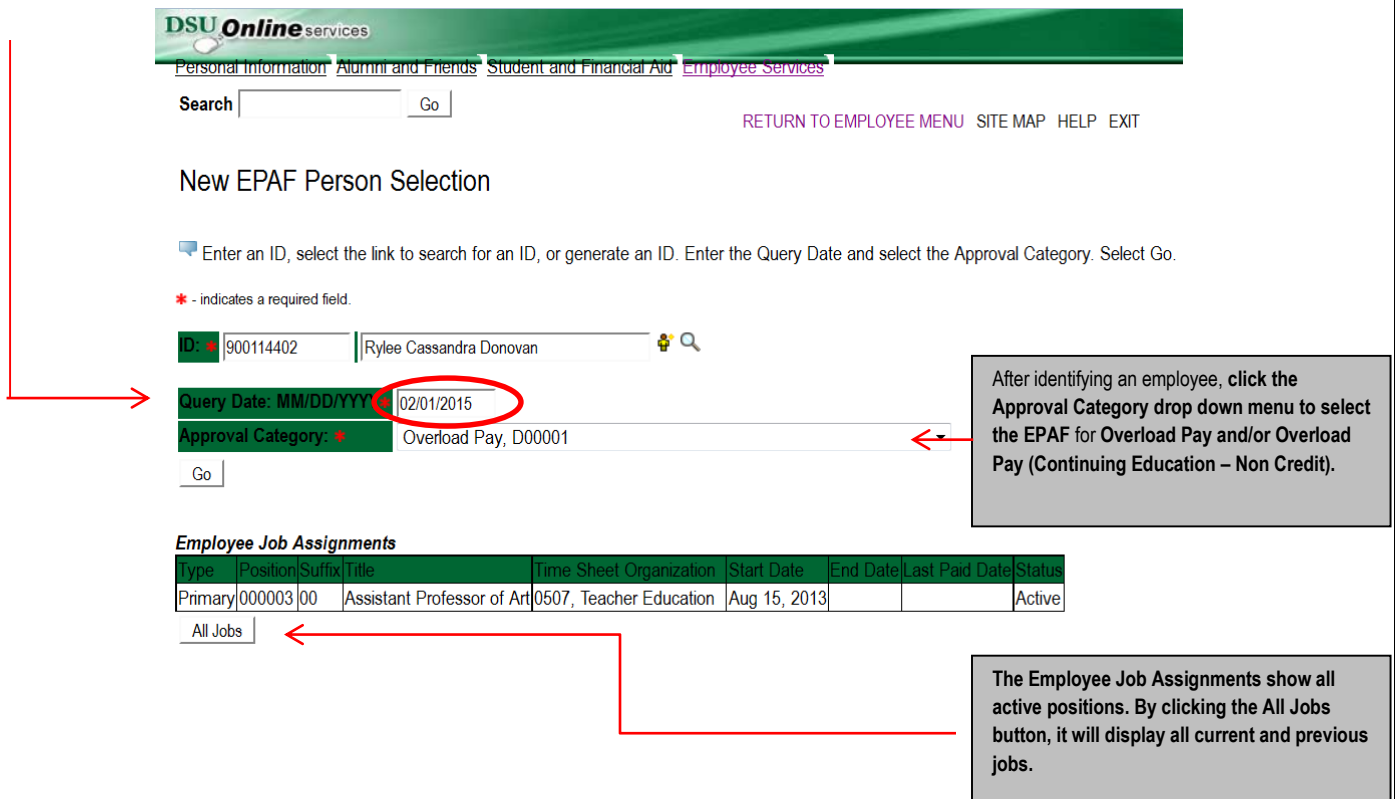
Log into Employee Self Service and choose **ELECTRONIC PERSONNEL ACTION FORMS** and then **NEW EPAF**.

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

1. Enter the employee's 900# or click on the  magnifying glass to search for an employee's 900#.
2. The query date will default to today's date. Change the query date to:
  - o Fall Semester: **09/01/2018 or 09/01/20\_\_**
  - o Spring Semester: **02/01/2018 or 02/01/20\_\_**
3. Select **Overload Pay or Overload Pay (Continuing Education)** from the drop down approval category box.

**!!! IMPORTANT !!!**

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



DSU Online services

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


Search  Go

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

### New EPAF Person Selection

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

\* - indicates a required field.

ID:  |  

Query Date: MM/DD/YYYY

Approval Category:

Go

#### Employee Job Assignments

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

All Jobs

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

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

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

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

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

DSU Online services

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

Search [ ] Go [ ] RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT

New EPAF Job Selection

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

ID: Rylee Cassandra Donovan, 900114402  
 Query Date: Feb 01, 2015  
 Approval Category: Overload Pay, D00001

Overload/Add Job, OVERSP

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

All Jobs | Next Approval Type [ ] Go [ ]

6. View Employee Class:

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





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

\* - indicates a required field.

**View Employee Employment Class**

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

7. Enter Overload Pay Information

| Field                                | Statement/Action   | Action/Example  |               |           |                                      |                      |                      |  |        |                        |   |
|--------------------------------------|--|---|---------------|-----------|--------------------------------------|----------------------|----------------------|--|--------|------------------------|---|
| Job Begin Date:                      | <p>If statement below says "Last Paid Date:"....then </p> <p><b>Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 Overload ENG 101</b> <b>Last Paid Date: May 31, 2014</b></p> <table border="1"> <thead> <tr> <th>Item</th> <th>Current Value</th> <th>New Value</th> </tr> </thead> <tbody> <tr> <td>Job Begin Date: MM/DD/YYYY</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table>  | Item  | Current Value | New Value | Job Begin Date: MM/DD/YYYY           | <input type="text"/> | <input type="text"/> | Leave field blank  |        |                        |   |
| Item                                 | Current Value  | New Value   |               |           |                                      |                      |                      |  |        |                        |   |
| Job Begin Date: MM/DD/YYYY           | <input type="text"/>   | <input type="text"/>  |               |           |                                      |                      |                      |  |        |                        |   |
|                                      | <p>If statement below says "PT Instructor/Gen Acad Instr", ....then </p> <p><b>Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 PT Instructor / Gen Acad Instr</b></p> <table border="1"> <thead> <tr> <th>Item</th> <th>Current Value</th> <th>New Value</th> </tr> </thead> <tbody> <tr> <td>Job Begin Date: MM/DD/YYYY</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table>   | Item  | Current Value | New Value | Job Begin Date: MM/DD/YYYY           | <input type="text"/> | <input type="text"/> | <p>Enter:<br/>(enter corresponding year)</p> <p>09/01/20__ for Fall Semester</p> <p>02/01/20__ for Spring Semester</p> |        |                        |   |
| Item                                 | Current Value  | New Value   |               |           |                                      |                      |                      |  |        |                        |   |
| Job Begin Date: MM/DD/YYYY           | <input type="text"/>   | <input type="text"/>  |               |           |                                      |                      |                      |  |        |                        |   |
| Job Effective Date:                  | Field cannot be changed. Information is defaulted.   |   |               |           |                                      |                      |                      |  |        |                        |   |
| Job Personnel Date:                  | Field cannot be changed. Information is defaulted.   |   |               |           |                                      |                      |                      |  |        |                        |   |
| Title:                               | Enter the course information for the overload that is being paid.  | Example:<br>Overload ENG 101  |               |           |                                      |                      |                      |  |        |                        |   |
| Annual Salary:                       | Total amount to be paid for course overloads   | 3000.00   |               |           |                                      |                      |                      |  |        |                        |   |
| FTE:                                 | <p>FTE for overload is calculated as follows:</p> <p>.25 = 1 course overload                      .75 = 3 course overload<br/>.50 = 2 course overload                      1.00 = 4 course overload</p> <p>To figure FTE divide the amount to be paid by 12,000 Example: \$300/\$12,000 = .025</p>   | <p>Enter the number FTE for the number of course overloads:</p> <p>Example: .25</p> |               |           |                                      |                      |                      |  |        |                        |   |
| Contract Type                        | Field cannot be changed. Information is defaulted.   |   |               |           |                                      |                      |                      |  |        |                        |   |
| Employee Class Code                  | Field cannot be changed. Information is defaulted.   |   |               |           |                                      |                      |                      |  |        |                        |   |
| Payroll ID                           | <p>Payroll ID will default to M1. Field can be change. If the employee class under the "View Employee Employment Class" is F1, F4, or S1....then </p> <p>If the employee class under the "View Employee Employment Class" is F2....then </p> <p><b>View Employee Employment Class</b></p> <table border="1"> <thead> <tr> <th>Item</th> <th>Current Value</th> <th>New Value</th> </tr> </thead> <tbody> <tr> <td>Employee Class Code: (Not Enterable)</td> <td>F1, Faculty 9/12</td> <td><input type="text"/></td> </tr> <tr> <td>Employee Status: *(Not Enterable)</td> <td>Active</td> <td>A <input type="text"/></td> </tr> </tbody> </table> | Item  | Current Value | New Value | Employee Class Code: (Not Enterable) | F1, Faculty 9/12     | <input type="text"/> | Employee Status: *(Not Enterable)  | Active | A <input type="text"/> | <p>Payroll ID M1 should remain defaulted.</p> <p>Use the drop down box to change to M2.</p> |
| Item                                 | Current Value  | New Value   |               |           |                                      |                      |                      |  |        |                        |   |
| Employee Class Code: (Not Enterable) | F1, Faculty 9/12   | <input type="text"/>  |               |           |                                      |                      |                      |  |        |                        |   |
| Employee Status: *(Not Enterable)    | Active   | A <input type="text"/>  |               |           |                                      |                      |                      |  |        |                        |   |
| Leave Rept Pay ID                    | The Leave Report Pay ID should match the Payroll ID above.   | Match Leave Rept Pay ID to Payroll ID (either M1 or M2)                             |               |           |                                      |                      |                      |  |        |                        |   |
| Job Change Reason                    | Field cannot be changed. Information is defaulted.   |   |               |           |                                      |                      |                      |  |        |                        |   |
| Step                                 | Field cannot be changed. Information is defaulted.   |   |               |           |                                      |                      |                      |  |        |                        |   |
| Job Status                           | Field cannot be changed. Information is defaulted.   |   |               |           |                                      |                      |                      |  |        |                        |   |

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

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

View Employee Employment Class

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

8. Update Factor, Pays, and Hours

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

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

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

No Action Needed

9. Terminate Employee Job

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

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

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

No Action Needed





| Current                               |       |        |              |         |         |          |          |         |      |         |                      |          |                          |
|---------------------------------------|-------|--------|--------------|---------|---------|----------|----------|---------|------|---------|----------------------|----------|--------------------------|
| Effective Date: 02/01/2015            |       |        |              |         |         |          |          |         |      |         |                      |          |                          |
| COA                                   | Index | Fund   | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance Override | End Date |                          |
| New                                   |       |        |              |         |         |          |          |         |      |         |                      |          |                          |
| Effective Date: MM/DD/YYYY 02/01/2015 |       |        |              |         |         |          |          |         |      |         |                      |          |                          |
| COA                                   | Index | Fund   | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance Override | End Date | Remove                   |
| 1                                     |       | 10     | 3001         | 61200   | 0101    |          |          |         |      | 30.00   |                      |          | <input type="checkbox"/> |
| 1                                     |       | 340231 | 3001         | 61200   | 0101    |          |          |         |      | 70.00   |                      |          | <input type="checkbox"/> |
|                                       |       |        |              |         |         |          |          |         |      |         |                      |          |                          |
|                                       |       |        |              |         |         |          |          |         |      |         |                      |          |                          |
|                                       |       |        |              |         |         |          |          |         |      |         |                      |          |                          |
|                                       |       |        |              |         |         |          |          |         |      |         |                      |          |                          |
|                                       |       |        |              |         |         |          |          |         |      | Total:  | 100.00               |          |                          |

Default from Index | Save and Add New Rows

### 11. Routing Queue

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

#### Approval Queue

| Approval Level                            | User Name                             | Required Action | Remove                   |
|---|---------------------------------------|-----------------|--------------------------|
| 10 - (CHAIR) Chair                        |                                       | Approve         | <input type="checkbox"/> |
| 15 - (DEAN) Dean                          |                                       | Approve         | <input type="checkbox"/> |
| 39 - (ACAFF1) Academic Affairs (Hayley)   | HMURRELL<br>Hayley H Murrell          | Approve         | <input type="checkbox"/> |
| 40 - (ACDAFF) Academic Affairs            | CBALLARD<br>Cheryl M Ballard          | Approve         | <input type="checkbox"/> |
| 45 - (PROVOS) Provost of Academic Affairs | CMCADAMS<br>Charles Alan McAdams      | Approve         | <input type="checkbox"/> |
| 50 - (HRFYI) HR FYI                       | SMPHILLIPS<br>Samantha Myers Phillips | FYI             | <input type="checkbox"/> |
| 65 - (BUDGET) Budget Office               | BLINDSEY<br>Beverly Coons Lindsey     | Approve         | <input type="checkbox"/> |
| 70 - (PAYROL) Payroll FYI (Monthly)       | MPHILLIPS<br>Mary Ruth Phillips       | FYI             | <input type="checkbox"/> |
| 75 - (HRDIR) Human Resource Director      | LGIGER<br>Lisa Weeks Giger            | Approve         | <input type="checkbox"/> |
| 99 - (SUPER) Superuser                    | MPHILLIPS<br>Mary Ruth Phillips       | Apply           | <input type="checkbox"/> |
| Not Selected                              |                                       | Not Selected    | <input type="checkbox"/> |
| Not Selected                              |                                       | Not Selected    | <input type="checkbox"/> |
| Not Selected                              | Search                                | Not Selected    | <input type="checkbox"/> |
| Not Selected                              |                                       | Not Selected    | <input type="checkbox"/> |

Save and Add New Rows

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

### 13. Comments

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

Comment

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

Enter additional information here.

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

14. Save EPAF

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

Electronic Personnel Action Form

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

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

15. Submit EPAF

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

Electronic Personnel Action Form

✓ The transaction has been successfully submitted.  
Enter the information for the EPAF and either Save or Submit

|                    |  |                     |              |
|--------------------|--|---------------------|--------------|
| Name and ID:       | Rylee Cassandra Donovan, 900114402                   | Query Date:         | Oct 03, 2014 |
| Transaction:       | 15   | Transaction Status: | Pending      |
| Approval Category: | Overload Spring 2015 - Current Faculty/Staff, OVERSP |                     |              |



## Error and Warning Messages

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

Warnings are acceptable.

### *Errors and Warning Messages*

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

\* - indicates a required field.


## Delete

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

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

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

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

1. Enter the employee's 900# or click on the  magnifying glass to search for an employee's 900#.
2. The query date will default to today's date. Change the query date to:
  - o Fall Semester: **09/01/2018 or 09/01/20\_\_**
  - o Spring Semester: **02/01/2018 or 02/01/20\_\_**
3. Select **Adjunct Rehire** or **Adjunct Rehire (Continuing Education)** from the drop down approval category box.


**!!! IMPORTANT !!!**

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

## New EPAF Person Selection

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

\* - indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category:

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

## Employee Job Assignments

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

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

4. Click on "Go" to begin the Adjunct Rehire and/or Adjunct Rehire (Continuing Education – Non Credit) EPAF.
5. Click on the button "**All Jobs**".
6. Select the position in which to reactivate by clicking on the radial dial at the end of the row. The position to reactivate will usually be position 000458 for credit courses and 000478 for Continuing Education – Non Credit courses. The position to be reactivated will usually be the primary type.
7. If the employee does not have a job with the correct position number, then enter the position number in the format indicated below and click on "GO". **It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.**

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

To Add a New Position – Screen Shot

New EPAF Job Selection

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

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

Add Employee Job, ADDJOB

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

All Jobs

Next Approval Type

To Re-activate a Position – Screen Shot

New EPAF Job Selection

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

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

Add Employee Job, ADDJOB

| Search | Type    | Position | Suffix | Title                     | Time Sheet Organization | Start Date   | End Date     | Last Paid Date | Status | Select                           |
|--------|---------|----------|--------|---------------------------|-------------------------|--------------|--------------|----------------|--------|----------------------------------|
| Q      | New Job |          |        |                           |                         |              |              |                |        | <input type="radio"/>            |
|        | Primary | 000458   | 00     | Adjunct Instr Social Scie | 0387, Social Science    | Sep 01, 2014 | Dec 31, 2014 |                | Active | <input checked="" type="radio"/> |

All Jobs

Next Approval Type

To Activate a Grant Position – Screen Shot

New EPAF Job Selection

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

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

Add Employee Job, ADDJOB

| Search | Type      | Position | Suffix | Title                     | Time Sheet Organization            | Start Date   | End Date     | Last Paid Date | Status | Select                           |
|--------|-----------|----------|--------|---------------------------|------------------------------------|--------------|--------------|----------------|--------|----------------------------------|
| Q      | New Job   | 004030   | 00     | Adjunct Instructors       | 41211, Other General Institutional |              |              |                |        | <input checked="" type="radio"/> |
|        | Primary   | 000458   | 00     | Adjunct Instr Social Scie | 0387, Social Science               | Sep 01, 2014 | Dec 31, 2014 |                | Active | <input type="radio"/>            |
|        | Secondary | 000478   | 00     | Adjunct Instr Teach Ed    | 0387, Social Science               | Feb 01, 2015 | May 31, 2015 |                | Active | <input type="radio"/>            |

All Jobs

Next Approval Type

Enter Adjunct Employment Record – See table below for instructions.

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

An \* is a required field.

### Adjunct Employment Record

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



**Add Employee Job, 000458-00 Adjunct Instr Social Scie**

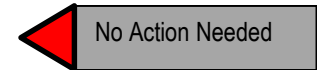
| Item   | Current Value              | New Value                |
|--|----------------------------|--------------------------|
| Job Begin Date: MM/DD/YYYY(Not Enterable)      | 09/01/2014                 |                          |
| Jobs Effective Date: MM/DD/YYYY(Not Enterable) | 09/01/2014    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

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

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

**Update Factors, Pays, and Hours,**

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



**10. Terminate Employee Job**

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

**Terminate Employee Job, 004030-00 Adjunct Instructors**

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



### 11. Labor Distribution – Update if Needed

- a. The current position’s labor distribution information is displayed. The “Labor Distribution in effect as of entered effective date” is the most current effective date for this position number.
- a. In the “NEW” section – add new rows or make changes to the existing rows. If no changes are needed, then take no action.
- b. EFFECTIVE DATE: The effective date in most cases is either 09/01/20\_\_ or 02/01/20\_\_.
- c. Apply the appropriate changes to the field if necessary.
- d. Changes to the accounting information will be LIMITED. The correct accounting information should default in the field according to the position number being used.
- e. The fund, organization, account, and program codes will NOT need to be change unless payment is being charged by grant or other funds.

#### Steps to change Labor Distributions

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

**Current**  
Effective Date: 09/01/2014

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

**New**  
Effective Date: MM/DD/YYYY | 02/01/2015

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

Defaulting values for Labor Distribution from the Job records.  
 Default from Index  Save and Add New Rows

**Callout 1:** In most cases the effective date will either be 09/01/20\_\_ or 02/01/20\_\_ The effective date can also be the day after the last paid date. The date cannot be after an employee’s last paid.

**Callout 2:** Change this percentage to 0.00 and click on Save and Add New Rows.

**Current**  
Effective Date: 09/01/2014

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

**Callout:** Screen shot new screen and saving and adding new rows.

**New**  
Effective Date: MM/DD/YYYY | 02/01/2015

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

Defaulting values for Labor Distribution from the Job records.  
 Default from Index  Save and Add New Rows

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





## 12. Routing Queue

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

### Approval Queue

| Approval Level                            | User Name                             | Required Action | Remove                   |
|---|---------------------------------------|-----------------|--------------------------|
| 10 - (CHAIR) Chair                        |                                       | Approve         | <input type="checkbox"/> |
| 15 - (DEAN) Dean                          |                                       | Approve         | <input type="checkbox"/> |
| 39 - (ACAFF1) Academic Affairs (Hayley)   | HMURRELL<br>Hayley H Murrell          | Approve         | <input type="checkbox"/> |
| 40 - (ACDAFF) Academic Affairs            | CBALLARD<br>Cheryl M Ballard          | Approve         | <input type="checkbox"/> |
| 45 - (PROVOS) Provost of Academic Affairs | CMCADAMS<br>Charles Alan McAdams      | Approve         | <input type="checkbox"/> |
| 50 - (HRFYI) HR FYI                       | SMPHILLIPS<br>Samantha Myers Phillips | FYI             | <input type="checkbox"/> |
| 65 - (BUDGET) Budget Office               | BLINDSEY<br>Beverly Coons Lindsey     | Approve         | <input type="checkbox"/> |
| 70 - (PAYROL) Payroll FYI (Monthly)       | MPHILLIPS<br>Mary Ruth Phillips       | FYI             | <input type="checkbox"/> |
| 75 - (HRDIR) Human Resource Director      | LGIGER<br>Lisa Weeks Giger            | Approve         | <input type="checkbox"/> |
| 99 - (SUPER) Superuser                    | MPHILLIPS<br>Mary Ruth Phillips       | Apply           | <input type="checkbox"/> |
| Not Selected                              |                                       | Not Selected    | <input type="checkbox"/> |
| Not Selected                              |                                       | Not Selected    | <input type="checkbox"/> |
| Not Selected                              |                                       | Not Selected    | <input type="checkbox"/> |
| Not Selected                              |                                       | Not Selected    | <input type="checkbox"/> |

Save and Add New Rows

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

## 14. Comments

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

### Comment

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

**Enter additional information here.**

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

### 15. Save EPAF

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

#### Electronic Personnel Action Form

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

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

### 16. Submit EPAF

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

#### Electronic Personnel Action Form

✔ The transaction has been successfully submitted.  
Enter the information for the EPAF and either Save or Submit

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

## Error and Warning Messages

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

Warnings are acceptable.

### **Errors and Warning Messages**

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

\* - indicates a required field.

## Delete


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

## How to Process:

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

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

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

- Enter the employee's 900# or click on the  magnifying glass to search for an employee's 900#.
- The query date will default to today's date. Change the query date to:
  - a. Summer School Session I: **06/01/2018 or 06/01/20\_\_**
  - b. Summer School Session II: **07/01/2018 or 07/01/20\_\_**
- Select from the drop down approval category box
  - **Summer School Overload Pay**
  - **Summer School Overload Pay (Continuing Education)**
  - **Summer School Overload Pay – Course Offered Over Both Sessions**
  - **Summer School Overload Pay – Continuing Education – Course Offered Over Both Sessions**


### **!!! IMPORTANT !!!**

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

#### New EPAF Person Selection

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

\* - indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category:

#### Employee Job Assignments

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

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

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

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

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

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

### New EPAF Job Selection

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

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

#### Overload/Add Job, C00006


| Search               | Type    | Position | Suffix | Title                          | Time Sheet Organization | Start Date   | End Date | Last Paid Date | Status | Select                           |
|----------------------|---------|----------|--------|--------------------------------|-------------------------|--------------|----------|----------------|--------|----------------------------------|
| <input type="text"/> | New Job | 000468   | 00     | Summer School                  | 1701, Summer School     |              |          |                |        | <input checked="" type="radio"/> |
|                      | Primary | 000201   | 00     | Dir Field Experiences & Profes | 0507, Teacher Education | Sep 01, 2013 |          |                | Active | <input type="radio"/>            |

All Jobs |  
 Next Approval Type | Go


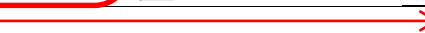
- View Employee Class:
  - This section allows the originator to view the current employee's employment information.
  - Employment Status must equal (A) – Active.
  - If employment status is listed something else other than Active, do not use this EPAF.
  - These fields are not able to be changed.*

\* - indicates a required field.

### View Employee Employment Class

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

• Enter Overload Pay Information

| Field  | Statement/Action   | Action/Example   |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
|--|--|--|---------------|-----------|----------------------------|----------------------|----------------------|--|----------------------|---|---|----------------------|---|--------------------------------|----------------------|---------------------------------------|----------|-------------------------|----------------------|------------------|----------------------|----------------------|--------|----------------------|----------------------|---------------------------------------|----------------------|---------------------------------|------------------------------|----------------------|---------------------------------|-------------------------------------|----------------------|---|------------------------------------|----------------------|---|-------------------------------------|----------------------|---------------------------------|------------------------------------|----------------------|-----------------------------------|---|----------------------|--------------------------------|-----------------------------|----------------------|--------------------------------|--|
| Job Begin Date:                                | <p>If the "Current Value" column is populated, then </p> <p><b>Overload/Add Job, 000468-00 Summer School ii CSP686, Last Paid Date: Jun 26, 2014</b></p> <table border="1"> <thead> <tr> <th>Item</th> <th>Current Value</th> <th>New Value</th> </tr> </thead> <tbody> <tr> <td>Job Begin Date: MM/DD/YYYY</td> <td>05/01/1993</td> <td><input type="text"/></td> </tr> <tr> <td>Jobs Effective Date: MM/DD/YYYY(Not Enterable)</td> <td>07/30/2014</td> <td><input type="text" value="06/01/2015"/></td> </tr> <tr> <td>Personnel Date: MM/DD/YYYY(Not Enterable)</td> <td>07/30/2014</td> <td><input type="text" value="05/26/2015"/></td> </tr> <tr> <td>Contract Type: (Not Enterable)</td> <td>Overload</td> <td><input type="text" value="0"/></td> </tr> <tr> <td>Title: *</td> <td>Summer School ii CSP686</td> <td><input type="text"/></td> </tr> <tr> <td>Annual Salary: *</td> <td>3000</td> <td><input type="text"/></td> </tr> <tr> <td>FTE: *</td> <td>.25</td> <td><input type="text"/></td> </tr> <tr> <td>Employee Class Code: *(Not Enterable)</td> <td>F1, Faculty 9/12</td> <td><input type="text" value="F3"/></td> </tr> <tr> <td>Payroll Id: *(Not Enterable)</td> <td>SU</td> <td><input type="text" value="SU"/></td> </tr> <tr> <td>Leave Rept Pay ID: *(Not Enterable)</td> <td>SU</td> <td><input type="text" value="SU"/></td> </tr> <tr> <td>Job Change Reason: (Not Enterable)</td> <td>JBEND</td> <td><input type="text" value="OVER"/></td> </tr> <tr> <td>Step: (Not Enterable)</td> <td>0</td> <td><input type="text" value="0"/></td> </tr> <tr> <td>Job Status: (Not Enterable)</td> <td>Terminated</td> <td><input type="text" value="A"/></td> </tr> </tbody> </table>  | Item   | Current Value | New Value | Job Begin Date: MM/DD/YYYY | 05/01/1993           | <input type="text"/> | Jobs Effective Date: MM/DD/YYYY(Not Enterable) | 07/30/2014           | <input type="text" value="06/01/2015"/> | Personnel Date: MM/DD/YYYY(Not Enterable) | 07/30/2014           | <input type="text" value="05/26/2015"/> | Contract Type: (Not Enterable) | Overload             | <input type="text" value="0"/>        | Title: * | Summer School ii CSP686 | <input type="text"/> | Annual Salary: * | 3000                 | <input type="text"/> | FTE: * | .25                  | <input type="text"/> | Employee Class Code: *(Not Enterable) | F1, Faculty 9/12     | <input type="text" value="F3"/> | Payroll Id: *(Not Enterable) | SU                   | <input type="text" value="SU"/> | Leave Rept Pay ID: *(Not Enterable) | SU                   | <input type="text" value="SU"/>           | Job Change Reason: (Not Enterable) | JBEND                | <input type="text" value="OVER"/>         | Step: (Not Enterable)               | 0                    | <input type="text" value="0"/>  | Job Status: (Not Enterable)        | Terminated           | <input type="text" value="A"/>    | <p>Leave "Job Begin Date" field blank</p> |                      |                                |                             |                      |                                |  |
| Item   | Current Value  | New Value  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Job Begin Date: MM/DD/YYYY                     | 05/01/1993   | <input type="text"/>   |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Jobs Effective Date: MM/DD/YYYY(Not Enterable) | 07/30/2014   | <input type="text" value="06/01/2015"/>  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Personnel Date: MM/DD/YYYY(Not Enterable)      | 07/30/2014   | <input type="text" value="05/26/2015"/>  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Contract Type: (Not Enterable)                 | Overload   | <input type="text" value="0"/>   |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Title: *                                       | Summer School ii CSP686  | <input type="text"/>   |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Annual Salary: *                               | 3000   | <input type="text"/>   |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| FTE: *   | .25  | <input type="text"/>   |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Employee Class Code: *(Not Enterable)          | F1, Faculty 9/12   | <input type="text" value="F3"/>  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Payroll Id: *(Not Enterable)                   | SU   | <input type="text" value="SU"/>  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Leave Rept Pay ID: *(Not Enterable)            | SU   | <input type="text" value="SU"/>  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Job Change Reason: (Not Enterable)             | JBEND  | <input type="text" value="OVER"/>  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Step: (Not Enterable)                          | 0  | <input type="text" value="0"/>   |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Job Status: (Not Enterable)                    | Terminated   | <input type="text" value="A"/>   |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
|  | <p>If the "Current Value" field is not populated, then, </p> <p><b>Overload/Add Job, 000468-00 Summer School</b></p> <table border="1"> <thead> <tr> <th>Item</th> <th>Current Value</th> <th>New Value</th> </tr> </thead> <tbody> <tr> <td>Job Begin Date: MM/DD/YYYY</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Jobs Effective Date: MM/DD/YYYY(Not Enterable)</td> <td><input type="text"/></td> <td><input type="text" value="06/01/2016"/></td> </tr> <tr> <td>Personnel Date: MM/DD/YYYY(Not Enterable)</td> <td><input type="text"/></td> <td><input type="text" value="05/31/2016"/></td> </tr> <tr> <td>Contract Type:</td> <td><input type="text"/></td> <td><input type="text" value="Overload"/></td> </tr> <tr> <td>Title: *</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Annual Salary: *</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>FTE: *</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Employee Class Code: *(Not Enterable)</td> <td><input type="text"/></td> <td><input type="text" value="F3"/></td> </tr> <tr> <td>Payroll Id: *(Not Enterable)</td> <td><input type="text"/></td> <td><input type="text" value="SU"/></td> </tr> <tr> <td>Time Entry Type:</td> <td><input type="text"/></td> <td><input type="text" value="Not Selected"/></td> </tr> <tr> <td>Time Entry Type:</td> <td><input type="text"/></td> <td><input type="text" value="Not Selected"/></td> </tr> <tr> <td>Leave Rept Pay ID: *(Not Enterable)</td> <td><input type="text"/></td> <td><input type="text" value="SU"/></td> </tr> <tr> <td>Job Change Reason: (Not Enterable)</td> <td><input type="text"/></td> <td><input type="text" value="OVER"/></td> </tr> <tr> <td>Step: (Not Enterable)</td> <td><input type="text"/></td> <td><input type="text" value="0"/></td> </tr> <tr> <td>Job Status: (Not Enterable)</td> <td><input type="text"/></td> <td><input type="text" value="A"/></td> </tr> </tbody> </table> | Item   | Current Value | New Value | Job Begin Date: MM/DD/YYYY | <input type="text"/> | <input type="text"/> | Jobs Effective Date: MM/DD/YYYY(Not Enterable) | <input type="text"/> | <input type="text" value="06/01/2016"/> | Personnel Date: MM/DD/YYYY(Not Enterable) | <input type="text"/> | <input type="text" value="05/31/2016"/> | Contract Type:                 | <input type="text"/> | <input type="text" value="Overload"/> | Title: * | <input type="text"/>    | <input type="text"/> | Annual Salary: * | <input type="text"/> | <input type="text"/> | FTE: * | <input type="text"/> | <input type="text"/> | Employee Class Code: *(Not Enterable) | <input type="text"/> | <input type="text" value="F3"/> | Payroll Id: *(Not Enterable) | <input type="text"/> | <input type="text" value="SU"/> | Time Entry Type:                    | <input type="text"/> | <input type="text" value="Not Selected"/> | Time Entry Type:                   | <input type="text"/> | <input type="text" value="Not Selected"/> | Leave Rept Pay ID: *(Not Enterable) | <input type="text"/> | <input type="text" value="SU"/> | Job Change Reason: (Not Enterable) | <input type="text"/> | <input type="text" value="OVER"/> | Step: (Not Enterable)                     | <input type="text"/> | <input type="text" value="0"/> | Job Status: (Not Enterable) | <input type="text"/> | <input type="text" value="A"/> | <p>Enter:<br/>(enter corresponding dates)</p> <p><b>06/01/2018 or<br/>06/01/20__ - Summer<br/>School I</b></p> <p><b>07/01/2018 or<br/>07/01/20__ - for<br/>Summer School II</b></p> |
| Item   | Current Value  | New Value  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Job Begin Date: MM/DD/YYYY                     | <input type="text"/>   | <input type="text"/>   |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Jobs Effective Date: MM/DD/YYYY(Not Enterable) | <input type="text"/>   | <input type="text" value="06/01/2016"/>  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Personnel Date: MM/DD/YYYY(Not Enterable)      | <input type="text"/>   | <input type="text" value="05/31/2016"/>  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Contract Type:                                 | <input type="text"/>   | <input type="text" value="Overload"/>  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Title: *                                       | <input type="text"/>   | <input type="text"/>   |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Annual Salary: *                               | <input type="text"/>   | <input type="text"/>   |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| FTE: *   | <input type="text"/>   | <input type="text"/>   |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Employee Class Code: *(Not Enterable)          | <input type="text"/>   | <input type="text" value="F3"/>  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Payroll Id: *(Not Enterable)                   | <input type="text"/>   | <input type="text" value="SU"/>  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Time Entry Type:                               | <input type="text"/>   | <input type="text" value="Not Selected"/>  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Time Entry Type:                               | <input type="text"/>   | <input type="text" value="Not Selected"/>  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Leave Rept Pay ID: *(Not Enterable)            | <input type="text"/>   | <input type="text" value="SU"/>  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Job Change Reason: (Not Enterable)             | <input type="text"/>   | <input type="text" value="OVER"/>  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Step: (Not Enterable)                          | <input type="text"/>   | <input type="text" value="0"/>   |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Job Status: (Not Enterable)                    | <input type="text"/>   | <input type="text" value="A"/>   |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Job Effective Date:                            | Field cannot be changed. Information is defaulted.   |  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Job Personnel Date:                            | Field cannot be changed. Information is defaulted.   |  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Title:   | Enter the course information for the overload that is being paid.  | <p>Example:</p> <p><b>Summer School ART<br/>101</b></p> <p><b>OR</b></p> <p><b>SSI ART 101/ART 103</b></p> |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Annual Salary:                                 | Total amount to be paid for course overloads   | <b>3000.00</b>   |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| FTE:   | <p>FTE for overload is calculated as follows:</p> <p>.25 = 1 course overload                      .75 = 3 course overload<br/>.50 = 2 course overload                      1.00 = 4 course overload</p>  | <p>Enter the number FTE for the number of course overloads:</p> <p><b>Example: .25</b></p>                 |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Contract Type                                  | Field cannot be changed. Information is defaulted.   |  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |
| Employee Class Code                            | Field cannot be changed. Information is defaulted.   |  |               |           |                            |                      |                      |  |                      |   |   |                      |   |                                |                      |                                       |          |                         |                      |                  |                      |                      |        |                      |                      |                                       |                      |                                 |                              |                      |                                 |                                     |                      |   |                                    |                      |   |                                     |                      |                                 |                                    |                      |                                   |   |                      |                                |                             |                      |                                |  |

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

**Overload/Add Job, 000468-00 Summer School**

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

- Update Factor, Pays, and Hours

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

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

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

No Action Needed

- Terminate Employee Job

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

**Terminate Job Only, 000468-00 Summer School**

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

No Action Needed

• **Update Default Earnings**

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

If a current date is not listed under the "CURRENT" effective date, then enter 06/01/2017 for Summer School I or 07/01/2017 for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.

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

| Current        |              |                        |              |              |       |          |        |  |  |
|----------------|--------------|------------------------|--------------|--------------|-------|----------|--------|--|--|
| Effective Date | Earnings     | Hours or Units Per Pay | Deemed Hours | Special Rate | Shift | End Date | Remove |  |  |
|                | Not Selected |                        |              |              | 1     |          |        |  |  |
|                | Not Selected |                        |              |              | 1     |          |        |  |  |
|                | Not Selected |                        |              |              | 1     |          |        |  |  |
|                | Not Selected |                        |              |              | 1     |          |        |  |  |

- b. Enter **06/01/2018** for Summer School I or **07/01/2018** for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.
- c. Select SUM, Summer Pay as the Earnings Code using the drop down box.
- d. Enter **84.00** as the Hours or Units Per Pay.

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

| Current        |                 |                        |              |              |       |          |        |  |  |
|----------------|-----------------|------------------------|--------------|--------------|-------|----------|--------|--|--|
| Effective Date | Earnings        | Hours or Units Per Pay | Deemed Hours | Special Rate | Shift | End Date | Remove |  |  |
| 06/01/2016     | SUM, Summer Pay | 84.00                  |              |              | 1     |          |        |  |  |
|                | Not Selected    |                        |              |              | 1     |          |        |  |  |
|                | Not Selected    |                        |              |              | 1     |          |        |  |  |
|                | Not Selected    |                        |              |              | 1     |          |        |  |  |

If the fields are populated under the “CURRENT EFFECTIVE DATE” as shown below, then under the “NEW VALUE EFFECTIVE DATE”, enter 06/01/2018 or 07/01/2018 depending on the summer session.

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

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

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

Enter 06/01/2018 or 07/01/2018 as the new effective date.

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

• **Labor Distribution – Update if Needed**

- In the “CURRENT” section – the current labor codes and the effective date of the last change will default into the form.
- In the “NEW” section – add new rows or make changes to the existing rows.
- Changes to the accounting information will be LIMITED. The correct accounting information should default in the field according to the position number being used.
- The fund, organization, account, and program codes will NOT need to be change unless payment is being charged by grant or other funds.
- EFFECTIVE DATE: The effective date should equal either: 06/01/2017 or 07/01/2017 depending on the summer school session.
- Apply the appropriate changes to the field if necessary.

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

Update Labor Distributions, 000468-00 Summer School

| Current                               |       |      |              |         |         |          |          |         |      |         |                      |          |
|---------------------------------------|-------|------|--------------|---------|---------|----------|----------|---------|------|---------|----------------------|----------|
| Effective Date: 06/01/2016            |       |      |              |         |         |          |          |         |      |         |                      |          |
| COA                                   | Index | Fund | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance Override | End Date |
| New                                   |       |      |              |         |         |          |          |         |      |         |                      |          |
| Effective Date: MM/DD/YYYY 06/01/2016 |       |      |              |         |         |          |          |         |      |         |                      |          |
| COA                                   | Index | Fund | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance Override | End Date |
| 1                                     |       | 10   | 1701         | 61200   | 0103    |          |          |         |      | 100.00  |                      |          |
|                                       |       |      |              |         |         |          |          |         |      |         |                      |          |
|                                       |       |      |              |         |         |          |          |         |      |         |                      |          |
|                                       |       |      |              |         |         |          |          |         |      |         |                      |          |
|                                       |       |      |              |         |         |          |          |         |      |         |                      |          |
| Total:                                |       |      |              |         |         |          |          |         |      | 100.00  |                      |          |

Make sure the date listed in the “EFFECTIVE DATE” field is:  
Summer School I: 06/01/2018  
Summer School II: 07/01/2018

✓ Default from Index Save and Add New Rows



**Steps to change Labor Distributions**

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

**Update Labor Distributions, 000468-00 Summer School**

The effective date will default to the query date or today's date. This needs to be changed to the following:  
 Summer School I: 06/01/2018  
 Summer School II: 07/01/2018

Current  
 Effective Date: 06/01/2016

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

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

Default from Index Save and Add New Rows

**Update Labor Distributions, 000468-00 Summer School**

Current  
 Effective Date: 06/01/2016

| COA    | Index | Fund | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance | Override | End Date |
|--------|-------|------|--------------|---------|---------|----------|----------|---------|------|---------|-------------|----------|----------|
| 1      |       | 10   | 1701         | 61200   | 0103    |          |          |         |      | 0.00    |             |          |          |
| Total: |       |      |              |         |         |          |          |         |      | 100.00  |             |          |          |

Default from Index Save and Add New Rows

5. Enter the new accounting information. The following must be entered for each line.
  - f. COA = enter 1.
  - g. Fund No.
  - h. Organization No.
  - i. Account No. = 61200
  - j. Percentage = totals must equal 100%. See sample below

Click to "Save and Add New Rows"

**Update Labor Distributions, 000468-00 Summer School**

Current  
 Effective Date: 06/01/2016

| COA    | Index | Fund   | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance | Override | End Date |
|--------|-------|--------|--------------|---------|---------|----------|----------|---------|------|---------|-------------|----------|----------|
| 1      |       | 10     | 1701         | 61200   | 0103    |          |          |         |      | 0.00    |             |          |          |
| 1      |       | 10     | 1701         | 61200   |         |          |          |         |      | 25.00   |             |          |          |
| 1      |       | 340231 | 4155         | 61200   |         |          |          |         |      | 75.00   |             |          |          |
| Total: |       |        |              |         |         |          |          |         |      | 100.00  |             |          |          |

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

Default from Index Save and Add New Rows



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

Comment

Enter additional information here.

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

#### 11. Save EPAF

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

### Electronic Personnel Action Form

✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

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

#### 12. Submit EPAF

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

## Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

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

### Error and Warning Messages

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

Warnings are acceptable.

#### **Errors and Warning Messages**

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

\* - indicates a required field.


### Delete

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


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

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


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

1. Enter the employee's 900# or click on the  magnifying glass to search for an employee's 900#.
2. The query date will default to today's date. Change the query date to:
  - a. Summer School I: **06/01/2018**
  - b. Summer School II: **07/01/2018**
3. Select from the drop down approval category box:
  - **Summer School Adjunct Re-Appointment**
  - **Summer School Adjunct Re-Appointment (Continuing Education)**
  - **Summer School Adjunct Re-Appointment (Course Taught Over Both Sessions)**
  - **Summer School Adjunct Re-Appointment – Continuing Education (Course Taught Over Both Sessions)**

## New EPAF Person Selection

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

\* - indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category: \*

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

### Employee Job Assignments

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

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

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

4. Click on "Go" to begin the Summer School EPAFs for Adjunct Rehire and/or Adjunct Rehire (Continuing Education – Non Credit).
5. Click on the button "**All Jobs**".
6. Select the position in which to reactivate by clicking on the radial dial at the end of the row. The position to reactivate will usually be position 000468 for credit courses and 000478 for Continuing Education – Non Credit courses.
7. If the employee does not have a job with the correct position number, then enter the position number in the format indicated below and click on "GO". **It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.**

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

**Overload/Add Job, C00006**

| Search               | Type    | Position | Suffix | Title                      | Time Sheet Organization | Start Date   | End Date | Last Paid Date | Status | Select                |
|----------------------|---------|----------|--------|----------------------------|-------------------------|--------------|----------|----------------|--------|-----------------------|
| <input type="text"/> | New Job | 000468   | 00     | Summer School              | 1701, Summer School     |              |          |                |        | <input type="radio"/> |
|                      | Primary | 000003   | 00     | Assistant Professor of Art | 0507, Teacher Education | Aug 15, 2013 |          |                | Active | <input type="radio"/> |

All Jobs

Next Approval Type

Go

**Enter Adjunct Employment Record – See table below for instructions.**

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

**An \* is a required field.**

| Item   | Current Value              | New Value            |
|--|----------------------------|----------------------|
| Home Organization:                           | 0377, Music                | <input type="text"/> |
| Distribution Orgn:                           | 0377, Music                | <input type="text"/> |
| Current Hire Date: MM/DD/YYYY(Not Enterable) | 01/01/2016                 | <input type="text"/> |
| Employee Status: *(Not Enterable)            | Active                     | <input type="text"/> |
| Employee Class Code:                         | F3, Faculty P/T < 9 Months | <input type="text"/> |
| Home COAS: *(Not Enterable)                  | 1                          | <input type="text"/> |
| Term Reason Code: (Not Enterable)            |                            | <input type="text"/> |
| Termination Date: MM/DD/YYYY(Not Enterable)  |                            | <input type="text"/> |
| Last Work Date: MM/DD/YYYY(Not Enterable)    |                            | <input type="text"/> |

- Enter Overload Pay Information

| Field  | Statement/Action  | Action/Example   |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
|--|---|--|---------------|-----------|----------------------------|------------|--|--|------------|------------|---|------------|------------|--------------------------------|----------|-----------|----------|-------------------------|--|------------------|------|--|--------|-----|--|---------------------------------------|------------------|----|------------------------------|----|----|-------------------------------------|----|----|------------------------------------|-------|-------|-----------------------|---|---|-----------------------------|------------|---|--|
| Job Begin Date:                                | <p>If the "Current Value" column is populated, then</p> <p><b>Overload/Add Job, 000468-00 Summer School ii CSP686, Last Paid Date: Jun 26, 2014</b></p> <table border="1"> <thead> <tr> <th>Item</th> <th>Current Value</th> <th>New Value</th> </tr> </thead> <tbody> <tr> <td>Job Begin Date: MM/DD/YYYY</td> <td>05/01/1993</td> <td></td> </tr> <tr> <td>Jobs Effective Date: MM/DD/YYYY(Not Enterable)</td> <td>07/30/2014</td> <td>06/01/2015</td> </tr> <tr> <td>Personnel Date: MM/DD/YYYY(Not Enterable)</td> <td>07/30/2014</td> <td>05/26/2015</td> </tr> <tr> <td>Contract Type: (Not Enterable)</td> <td>Overload</td> <td></td> </tr> <tr> <td>Title: *</td> <td>Summer School ii CSP686</td> <td></td> </tr> <tr> <td>Annual Salary: *</td> <td>3000</td> <td></td> </tr> <tr> <td>FTE: *</td> <td>.25</td> <td></td> </tr> <tr> <td>Employee Class Code: *(Not Enterable)</td> <td>F1, Faculty 9/12</td> <td>F3</td> </tr> <tr> <td>Payroll Id: *(Not Enterable)</td> <td>SU</td> <td>SU</td> </tr> <tr> <td>Leave Rept Pay ID: *(Not Enterable)</td> <td>SU</td> <td>SU</td> </tr> <tr> <td>Job Change Reason: (Not Enterable)</td> <td>JBEND</td> <td>OVER</td> </tr> <tr> <td>Step: (Not Enterable)</td> <td>0</td> <td></td> </tr> <tr> <td>Job Status: (Not Enterable)</td> <td>Terminated</td> <td>A</td> </tr> </tbody> </table> | Item   | Current Value | New Value | Job Begin Date: MM/DD/YYYY | 05/01/1993 |  | Jobs Effective Date: MM/DD/YYYY(Not Enterable) | 07/30/2014 | 06/01/2015 | Personnel Date: MM/DD/YYYY(Not Enterable) | 07/30/2014 | 05/26/2015 | Contract Type: (Not Enterable) | Overload |           | Title: * | Summer School ii CSP686 |  | Annual Salary: * | 3000 |  | FTE: * | .25 |  | Employee Class Code: *(Not Enterable) | F1, Faculty 9/12 | F3 | Payroll Id: *(Not Enterable) | SU | SU | Leave Rept Pay ID: *(Not Enterable) | SU | SU | Job Change Reason: (Not Enterable) | JBEND | OVER  | Step: (Not Enterable) | 0 |   | Job Status: (Not Enterable) | Terminated | A | <p>Leave "Job Begin Date" field blank</p>  |
| Item   | Current Value   | New Value  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Job Begin Date: MM/DD/YYYY                     | 05/01/1993  |  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Jobs Effective Date: MM/DD/YYYY(Not Enterable) | 07/30/2014  | 06/01/2015   |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Personnel Date: MM/DD/YYYY(Not Enterable)      | 07/30/2014  | 05/26/2015   |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Contract Type: (Not Enterable)                 | Overload  |  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Title: *                                       | Summer School ii CSP686   |  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Annual Salary: *                               | 3000  |  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| FTE: *   | .25   |  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Employee Class Code: *(Not Enterable)          | F1, Faculty 9/12  | F3   |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Payroll Id: *(Not Enterable)                   | SU  | SU   |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Leave Rept Pay ID: *(Not Enterable)            | SU  | SU   |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Job Change Reason: (Not Enterable)             | JBEND   | OVER   |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Step: (Not Enterable)                          | 0   |  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Job Status: (Not Enterable)                    | Terminated  | A  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
|  | <p>If the "Current Value" field is not populated, then,</p> <p><b>Add Employee Job, 000468-00 Summer School</b></p> <table border="1"> <thead> <tr> <th>Item</th> <th>Current Value</th> <th>New Value</th> </tr> </thead> <tbody> <tr> <td>Job Begin Date: MM/DD/YYYY</td> <td></td> <td></td> </tr> <tr> <td>Jobs Effective Date: MM/DD/YYYY(Not Enterable)</td> <td></td> <td>06/01/2016</td> </tr> <tr> <td>Personnel Date: MM/DD/YYYY(Not Enterable)</td> <td></td> <td>05/31/2016</td> </tr> <tr> <td>Contract Type:</td> <td></td> <td>Secondary</td> </tr> <tr> <td>Title: *</td> <td></td> <td></td> </tr> <tr> <td>Annual Salary: *</td> <td></td> <td></td> </tr> <tr> <td>FTE: *</td> <td></td> <td></td> </tr> <tr> <td>Employee Class Code: *(Not Enterable)</td> <td></td> <td>F3</td> </tr> <tr> <td>Payroll Id: *(Not Enterable)</td> <td></td> <td>SU</td> </tr> <tr> <td>Leave Rept Pay ID: *(Not Enterable)</td> <td></td> <td>SU</td> </tr> <tr> <td>Job Change Reason: (Not Enterable)</td> <td></td> <td>ADJUN</td> </tr> <tr> <td>Step: (Not Enterable)</td> <td></td> <td>0</td> </tr> <tr> <td>Job Status: (Not Enterable)</td> <td></td> <td>A</td> </tr> </tbody> </table>  | Item   | Current Value | New Value | Job Begin Date: MM/DD/YYYY |            |  | Jobs Effective Date: MM/DD/YYYY(Not Enterable) |            | 06/01/2016 | Personnel Date: MM/DD/YYYY(Not Enterable) |            | 05/31/2016 | Contract Type:                 |          | Secondary | Title: * |                         |  | Annual Salary: * |      |  | FTE: * |     |  | Employee Class Code: *(Not Enterable) |                  | F3 | Payroll Id: *(Not Enterable) |    | SU | Leave Rept Pay ID: *(Not Enterable) |    | SU | Job Change Reason: (Not Enterable) |       | ADJUN | Step: (Not Enterable) |   | 0 | Job Status: (Not Enterable) |            | A | <p>Enter: (enter corresponding dates)</p> <p><b>06/01/2018</b> – Summer School I</p> <p><b>07/01/2018</b> - for Summer School II</p> |
| Item   | Current Value   | New Value  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Job Begin Date: MM/DD/YYYY                     |   |  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Jobs Effective Date: MM/DD/YYYY(Not Enterable) |   | 06/01/2016   |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Personnel Date: MM/DD/YYYY(Not Enterable)      |   | 05/31/2016   |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Contract Type:                                 |   | Secondary  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Title: *                                       |   |  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Annual Salary: *                               |   |  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| FTE: *   |   |  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Employee Class Code: *(Not Enterable)          |   | F3   |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Payroll Id: *(Not Enterable)                   |   | SU   |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Leave Rept Pay ID: *(Not Enterable)            |   | SU   |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Job Change Reason: (Not Enterable)             |   | ADJUN  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Step: (Not Enterable)                          |   | 0  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Job Status: (Not Enterable)                    |   | A  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Job Effective Date:                            | Field cannot be changed. Information is defaulted.  |  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Job Personnel Date:                            | Field cannot be changed. Information is defaulted.  |  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Title:   | Enter the course information for the overload that is being paid.   | Example:<br><b>Adjunct Instr in Art</b>  |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| Annual Salary:                                 | Total amount to be paid for course overloads  | <b>3000.00</b>   |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |
| FTE:   | <p>FTE for overload is calculated as follows:</p> <p>.25 = 1 course overload      .75 = 3 course overload<br/>           .50 = 2 course overload      1.00 = 4 course overload</p>  | <p>Enter the number FTE for the number of course overloads:</p> <p><b>Example: .25</b></p> |               |           |                            |            |  |  |            |            |   |            |            |                                |          |           |          |                         |  |                  |      |  |        |     |  |                                       |                  |    |                              |    |    |                                     |    |    |                                    |       |       |                       |   |   |                             |            |   |  |

|                     |   |   |
|---------------------|---|---|
| Contract Type       | Field cannot be changed. Information is defaulted.          |   |
| Employee Class Code | Field cannot be changed. Information is defaulted.          |   |
| Payroll ID          | Payroll ID will default to <b>SU</b> . Field can be change. | Payroll ID <b>SU</b> should remain defaulted.   |
| Leave Rept Pay ID   | The Leave Report Pay ID should match the Payroll ID above.  | Match Leave Rept Pay ID to Payroll ID <b>SU</b> |
| Job Change Reason   | Field cannot be changed. Information is defaulted.          |   |
| Step                | Field cannot be changed. Information is defaulted.          |   |
| Job Status          | Field cannot be changed. Information is defaulted.          |   |

- Update Factor, Pays, and Hours

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

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

| Item  | Current Value | New Value                               |   |
|---|---------------|---|---|
| Factor: *(Not Enterable)                        |               | <input type="text" value="1"/>          | <div style="border: 2px solid red; padding: 5px; display: inline-block;">No Action Needed</div> |
| Pays: *(Not Enterable)                          |               | <input type="text" value="1"/>          |   |
| Hours per Pay: *(Not Enterable)                 |               | <input type="text" value="84"/>         |   |
| Jobs Effective Date: MM/DD/YYYY*(Not Enterable) |               | <input type="text" value="06/01/2016"/> |   |

- Terminate Employee Job

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

### Terminate Job Only, 000468-00 Summer School

| Item  | Current Value | New Value                               |   |
|---|---------------|---|---|
| Jobs Effective Date: MM/DD/YYYY*(Not Enterable) |               | <input type="text" value="06/29/2016"/> | <div style="border: 2px solid red; padding: 5px; display: inline-block;">No Action Needed</div> |
| Job Status: *(Not Enterable)                    |               | <input type="text" value="T"/>          |   |
| Job Change Reason: *(Not Enterable)             |               | <input type="text" value="JBEND"/>      |   |



- **Update Default Earnings**

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

If a current date is not listed under the "CURRENT" effective date, then enter 06/01/2017 for Summer School I or 07/01/2017 for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.

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

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

- Enter **06/01/2018** for Summer School I or **07/01/2018** for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.
- Select SUM, Summer Pay as the Earnings Code using the drop down box.
- Enter **84.00** as the Hours or Units Per Pay.

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

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







## 18. Comments

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

Comment



**Enter additional information here.**

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

## 19. Save EPAF

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

## Electronic Personnel Action Form

✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

|                            |                                      |                    |              |
|----------------------------|--------------------------------------|--------------------|--------------|
| <b>Name and ID:</b>        | Olivia Caden Silver, 900127334       | <b>Query Date:</b> | Jun 01, 2016 |
| <b>Transaction:</b>        | 1637                                 |                    |              |
| <b>Transaction Status:</b> | Waiting                              |                    |              |
| <b>Approval Category:</b>  | Summer School Adjunct Rehire, D00042 |                    |              |

## 20. Submit EPAF

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

## Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

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

**Transaction:** 1637

**Query Date:** Jun 01, 2016

**Transaction Status:** Pending


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

## How to Process:

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

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

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

1. Enter the employee's 900# or click on the  magnifying glass to search for an employee's 900#.
2. The query date will default to today's date. Change the query date to the first day of the month in which the pay is to be issued.  
MM/01/20\_\_  
EXAMPLE: 01/01/2018 OR 02/01/2018 OR 03/01/2018
3. Select **One Time Payment – Extra Services (Non Academic Affairs)** or **One Time Payment – Extra Services (Academic Affairs)** from the drop down approval category box.

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


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

### !!! IMPORTANT !!!

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

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

\* - indicates a required field.

ID:  |  


Query Date: MM/DD/YYYY

Approval Category:

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

**Employee Job Assignments**

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

All Jobs 

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

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

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

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

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

## New EPAF Job Selection

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

**ID:** Rylee Olivia Donovan, 900124058

**Query Date:** Nov 01, 2015

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

### Overload/Add Job, C00006

| Search                   | Type    | Position | Suffix | Title                          | Time Sheet Organization            | Start Date   | End Date | Last Paid Date | Status | Select                           |
|--------------------------|---------|----------|--------|--------------------------------|------------------------------------|--------------|----------|----------------|--------|----------------------------------|
| <input type="checkbox"/> | New Job | 004026   | 00     | Miscellaneous Position Fund 25 | 41211, Other General Institutional |              |          |                |        | <input checked="" type="radio"/> |
| <input type="checkbox"/> | Primary | 000921   | 00     | Assistant Director             | 4113, Human Resource               | Oct 01, 2015 |          |                | Active | <input type="radio"/>            |

All Jobs

Next Approval Type

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

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



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



### View Employee Employment Class

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

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

### 7. Enter Overload Pay Information

| Field                           | Statement/Action   | Action/Example   |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
|---------------------------------|--|--|---------------|-----------|----------------------------|--|---|--|--|---|----------------------------|--|---|----------------|--|---------------------------------------|----------|--|---|---|
| Job Begin Date:                 | <p>If statement below says "Last Paid Date:"....then →</p> <p><b>Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 Overload ENG 10</b> Last Paid Date: May 31, 2014</p> <table border="1"> <thead> <tr> <th>Item</th> <th>Current Value</th> <th>New Value</th> </tr> </thead> <tbody> <tr> <td>Job Begin Date: MM/DD/YYYY</td> <td></td> <td><input type="text"/></td> </tr> </tbody> </table>   | Item   | Current Value | New Value | Job Begin Date: MM/DD/YYYY |  | <input type="text"/>                    | Leave field blank  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Item                            | Current Value  | New Value  |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Job Begin Date: MM/DD/YYYY      |  | <input type="text"/>                                       |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
|                                 | <p>If there is no current values in the "Current Value" fields,.....then →</p> <p><b>Overload/Add Job, 004026-00 Miscellaneous Position Fund 25</b></p> <table border="1"> <thead> <tr> <th>Item</th> <th>Current Value</th> <th>New Value</th> </tr> </thead> <tbody> <tr> <td>Job Begin Date: MM/DD/YYYY</td> <td></td> <td><input type="text"/></td> </tr> </tbody> </table>  | Item   | Current Value | New Value | Job Begin Date: MM/DD/YYYY |  | <input type="text"/>                    | Enter:<br>(enter corresponding year)<br><br>01/01/2018 or<br>02/01/2018 or<br>03/01/2018<br>MM/01/20__ |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Item                            | Current Value  | New Value  |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Job Begin Date: MM/DD/YYYY      |  | <input type="text"/>                                       |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Job Effective Date:             | Enter the first day of the month for which the one-time payment – extra services are to be paid  | 01/01/2018 or<br>02/01/2018 or<br>03/01/2018<br>MM/01/20__ |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Job Personnel Date:             | Enter the first day of the month for which the one-time payment – extra services are to be paid. This date should match the "Job Effective Date"   | 01/01/2018 or<br>02/01/2018 or<br>03/01/2018<br>MM/01/20__ |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Contract Type:                  | This field defaults to "Overload". Field may be changed to either Primary or Secondary.  |  |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Title:                          | Enter the description of the one time payment – extra services performed<br><b>Overload/Add Job, 004026-00 Miscellaneous Position Fund 25</b><br><br><table border="1"> <thead> <tr> <th>Item</th> <th>Current Value</th> <th>New Value</th> </tr> </thead> <tbody> <tr> <td>Job Begin Date: MM/DD/YYYY</td> <td></td> <td><input type="text" value="11/01/2015"/></td> </tr> <tr> <td>Jobs Effective Date: MM/DD/YYYY</td> <td></td> <td><input type="text" value="11/01/2015"/></td> </tr> <tr> <td>Personnel Date: MM/DD/YYYY</td> <td></td> <td><input type="text" value="11/01/2015"/></td> </tr> <tr> <td>Contract Type:</td> <td></td> <td><input type="text" value="Overload"/></td> </tr> <tr> <td>Title: *</td> <td></td> <td><input type="text" value="Basketball Ticket Worker"/></td> </tr> </tbody> </table> | Item   | Current Value | New Value | Job Begin Date: MM/DD/YYYY |  | <input type="text" value="11/01/2015"/> | Jobs Effective Date: MM/DD/YYYY  |  | <input type="text" value="11/01/2015"/> | Personnel Date: MM/DD/YYYY |  | <input type="text" value="11/01/2015"/> | Contract Type: |  | <input type="text" value="Overload"/> | Title: * |  | <input type="text" value="Basketball Ticket Worker"/> | Example:<br><br>Basketball Ticket Worker<br><br>First Year Seminar Instructor<br>(used pos 001202 00) |
| Item                            | Current Value  | New Value  |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Job Begin Date: MM/DD/YYYY      |  | <input type="text" value="11/01/2015"/>                    |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Jobs Effective Date: MM/DD/YYYY |  | <input type="text" value="11/01/2015"/>                    |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Personnel Date: MM/DD/YYYY      |  | <input type="text" value="11/01/2015"/>                    |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Contract Type:                  |  | <input type="text" value="Overload"/>                      |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Title: *                        |  | <input type="text" value="Basketball Ticket Worker"/>      |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Annual Salary:                  | Total amount to be paid for one time payments – extra services   | 100.00   |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| FTE:                            | FTE for one time payments – extra services are generally 0.00  | 0.00   |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Employee Class Code             | Field is defaulted to S3   |  |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |
| Payroll ID                      | Payroll ID will default to M2. Field can be change. If the employee class under the "View Employee Employment Class" is S1, S4, F1, or F4, or ....then →   | Use the drop down box to change to M1.                     |               |           |                            |  |   |  |  |   |                            |  |   |                |  |                                       |          |  |   |   |

|                                      | <p>If the employee class under the "View Employee Employment Class" is S2, F2, F3, ST, GA...then </p> <p>If the employee class under the "View Employee Employment Class" is RT, TE, S3...then the payroll ID will be determined based on previous job assignments. </p> <p><b>View Employee Employment Class</b></p> <table border="1"> <thead> <tr> <th>Item</th> <th>Current Value</th> <th>New Value</th> </tr> </thead> <tbody> <tr> <td>Employee Class Code: (Not Enterable)</td> <td>S1, Full Time Staff</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Employee Status: *(Not Enterable)</td> <td>Active</td> <td>A <input type="checkbox"/></td> </tr> </tbody> </table> | Item  | Current Value | New Value | Employee Class Code: (Not Enterable) | S1, Full Time Staff | <input type="checkbox"/> | Employee Status: *(Not Enterable) | Active | A <input type="checkbox"/> | <p>Payroll ID should remain defaulted to M2.</p> <p>Payroll ID will either be M1 or M2 based on previous job assignments.</p> |
|--------------------------------------|---|---|---------------|-----------|--------------------------------------|---------------------|--------------------------|-----------------------------------|--------|----------------------------|---|
| Item                                 | Current Value   | New Value   |               |           |                                      |                     |                          |                                   |        |                            |   |
| Employee Class Code: (Not Enterable) | S1, Full Time Staff   | <input type="checkbox"/>                                |               |           |                                      |                     |                          |                                   |        |                            |   |
| Employee Status: *(Not Enterable)    | Active  | A <input type="checkbox"/>                              |               |           |                                      |                     |                          |                                   |        |                            |   |
| Leave Rept Pay ID                    | The Leave Report Pay ID should match the Payroll ID above.  | Match Leave Rept Pay ID to Payroll ID (either M1 or M2) |               |           |                                      |                     |                          |                                   |        |                            |   |
| Job Change Reason                    | Field cannot be changed. Information is defaulted.  |   |               |           |                                      |                     |                          |                                   |        |                            |   |
| Step                                 | Field cannot be changed. Information is defaulted.  |   |               |           |                                      |                     |                          |                                   |        |                            |   |
| Job Status                           | Field cannot be changed. Information is defaulted.  |   |               |           |                                      |                     |                          |                                   |        |                            |   |

**Overload/Add Job, 004026-00 Miscellaneous Position Fund 25**

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

**View Employee Employment Class**

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

**8. Update Factor, Pays, and Hours**

| Field               | Statement/Action   | Action/Example   |
|---------------------|--|--|
| Factor:             | The field will default to one. If the payment is to be paid over multiple months, then change the field to represent the number of months to be paid | If the payment will be paid over 2 months, then enter 2 in the "Factor" field. |
| Pays:               | The field will default to one. The field must match the number of pays enter in the "Factor" Field   | The Pays number will be 2 if this payment will be paid over 2 months.          |
| Hours per Pay:      | Field cannot be changed. Information is defaulted.   | None   |
| Job Effective Date: | Enter the first day of the month in which this one-time payment is to be paid  | 01/01/2018 or<br>02/01/2018 or<br>03/01/2018<br>MM/01/20__                     |

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

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

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

**9. Update Default Earnings**

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

If a current date is not listed under the "CURRENT" effective date, then enter the first day of the month in which the one - time payment will be issued in the "NEW VALUE EFFECTIVE DATE" field. MM/01/20\_\_, EX. 06/01/2017

**Update Default Earnings, 004026-00 Miscellaneous Position Fund 25**

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

Save and Add New Rows

- h. Enter the first day of the month in which the one-time payment will be issued in the "NEW VALUE EFFECTIVE DATE" field. MM/01/20\_\_ **EXAMPLE: 02/01/2018**
- i. Select REG, Regular as the Earnings Code using the drop down box.
- j. Enter **84.00** as the Hours or Units Per Pay.

**Update Default Earnings, 004026-00 Miscellaneous Position Fund 25**

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

Save and Add New Rows

If the fields are populated under the “CURRENT EFFECTIVE DATE” as shown below, then under the “NEW VALUE EFFECTIVE DATE”, enter the 1<sup>st</sup> day of the month in which the payment is to be paid. MM/01/20\_\_ **EXAMPLE: 02/01/2018**

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

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

| New Value                 |                  |                        |              |              |       |                     |        |  |  |  |
|---------------------------|------------------|------------------------|--------------|--------------|-------|---------------------|--------|--|--|--|
| Effective Date MM/DD/YYYY | Earnings         | Hours or Units Per Pay | Deemed Hours | Special Rate | Shift | End Date MM/DD/YYYY | Remove |  |  |  |
| 07/01/2014                | REG, Regular Pay | 84.00                  |              |              | 1     |                     |        |  |  |  |
|                           | Not Selected     |                        |              |              | 1     |                     |        |  |  |  |
|                           | Not Selected     |                        |              |              | 1     |                     |        |  |  |  |
|                           | Not Selected     |                        |              |              | 1     |                     |        |  |  |  |
|                           | Not Selected     |                        |              |              | 1     |                     |        |  |  |  |

Enter the 1<sup>st</sup> day of the month in which the payment is to be paid:  
EXAMPLE: 02/01/2018

✔ Defaulting values for Default Earnings from the Job records.

Save and Add New Rows

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

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

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

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

✔ Defaulting values for Default Earnings from the Job records.

Save and Add New Rows

## 9. Terminate Employee Job

| Field               | Statement/Action   | Action/Example |
|---------------------|--|----------------|
| Job Effective Date: | Enter the last day of the month in which the payment is to be paid | 11/30/2016     |
| Job Status:         | Field cannot be changed. Information is defaulted.                 | None           |
| Job Change Reason:  | Field cannot be changed. Information is defaulted.                 | None           |

### Terminate Job Only, 004026-00 Miscellaneous Position Fund 25

| Item                                | Current Value | New Value                               |
|-------------------------------------|---------------|---|
| Jobs Effective Date: MM/DD/YYYY*    |               | <input type="text" value="11/30/2015"/> |
| Job Status: *(Not Enterable)        |               | <input type="text" value="T"/>          |
| Job Change Reason: *(Not Enterable) |               | <input type="text" value="JBEND"/>      |

Enter the last day of the month in which payment is to be paid. MM/31/20\_\_ or MM/30/20\_\_  
EXAMPLE: 02/28/2018

**10. Labor Distribution – Update if Needed**

- a. In the “CURRENT” section – the current labor codes and the effective date of the last change will default into the form.
- b. In the “NEW” section – add new rows or make changes to the existing rows.
- c. EFFECTIVE DATE: The effective date is the first day of the month in which the payment will be made: MM/01/20\_\_  
**EXAMPLE: 02/01/2018**
- d. Apply the appropriate changes to the field if necessary.

**Steps to change Labor Distributions**

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

Update Labor Distributions, 004026-00 Miscellaneous Position Fund 25

|   |       |        |              |         |         |          |          |         |      |         |             |                   |
|---|-------|--------|--------------|---------|---------|----------|----------|---------|------|---------|-------------|-------------------|
| <b>Current</b>                          |       |        |              |         |         |          |          |         |      |         |             |                   |
| Effective Date: 11/01/2015              |       |        |              |         |         |          |          |         |      |         |             |                   |
| COA                                     | Index | Fund   | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance | Override End Date |
| <b>New</b>                              |       |        |              |         |         |          |          |         |      |         |             |                   |
| Effective Date: MM/DD/YYYY   11/01/2015 |       |        |              |         |         |          |          |         |      |         |             |                   |
| 1                                       |       | 108601 | 41211        | 61300   | 0605    |          |          |         |      | 100.00  |             |                   |
|   |       |        |              |         |         |          |          |         |      |         |             |                   |
|   |       |        |              |         |         |          |          |         |      |         |             |                   |
|   |       |        |              |         |         |          |          |         |      |         |             |                   |
|   |       |        |              |         |         |          |          |         |      | Total:  | 100.00      |                   |

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

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

Default from Index | Save and Add New Rows

Update Labor Distributions, 004026-00 Miscellaneous Position Fund 25

|   |       |        |              |         |         |          |          |         |      |         |             |                   |
|---|-------|--------|--------------|---------|---------|----------|----------|---------|------|---------|-------------|-------------------|
| <b>Current</b>                          |       |        |              |         |         |          |          |         |      |         |             |                   |
| Effective Date: 11/01/2015              |       |        |              |         |         |          |          |         |      |         |             |                   |
| COA                                     | Index | Fund   | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance | Override End Date |
| <b>New</b>                              |       |        |              |         |         |          |          |         |      |         |             |                   |
| Effective Date: MM/DD/YYYY   11/01/2015 |       |        |              |         |         |          |          |         |      |         |             |                   |
| 1                                       |       | 108601 | 41211        | 61300   | 0605    |          |          |         |      | 0.00    |             |                   |
|   |       |        |              |         |         |          |          |         |      |         |             |                   |
|   |       |        |              |         |         |          |          |         |      |         |             |                   |
|   |       |        |              |         |         |          |          |         |      |         |             |                   |
|   |       |        |              |         |         |          |          |         |      | Total:  | 100.00      |                   |

Default from Index | Save and Add New Rows

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

- v. 61500 = Technical
- vi. 61600 = Skilled Craft
- vii. 61700 = Service Maintenance
- e. Percentage = totals must equal 100%. See sample below

Click to "Save and Add New Rows"

Update Labor Distributions, 004026-00 Miscellaneous Position Fund 25

| Current   |       |        |              |         |         |          |          |         |      |         |                      |          |                          |
|---|-------|--------|--------------|---------|---------|----------|----------|---------|------|---------|----------------------|----------|--------------------------|
| Effective Date: 11/01/2015                        |       |        |              |         |         |          |          |         |      |         |                      |          |                          |
| COA   | Index | Fund   | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance Override | End Date |                          |
| New   |       |        |              |         |         |          |          |         |      |         |                      |          |                          |
| Effective Date: MM/DD/YYYY   11/01/2015           |       |        |              |         |         |          |          |         |      |         |                      |          |                          |
| COA   | Index | Fund   | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance Override | End Date | Remove                   |
| 1   |       | 108601 | 41211        | 61300   | 0605    |          |          |         |      | .00     |                      |          | <input type="checkbox"/> |
| 1   |       | 108522 | 4021         | 61300   |         |          |          |         |      | 100     |                      |          | <input type="checkbox"/> |
|   |       |        |              |         |         |          |          |         |      |         |                      |          | <input type="checkbox"/> |
|   |       |        |              |         |         |          |          |         |      |         |                      |          | <input type="checkbox"/> |
|   |       |        |              |         |         |          |          |         |      |         |                      |          | <input type="checkbox"/> |
| Total:  |       |        |              |         |         |          |          |         |      | .00     |                      |          |                          |
| Default from Index   <b>Save and Add New Rows</b> |       |        |              |         |         |          |          |         |      |         |                      |          |                          |

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

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

Update Labor Distributions, 004026-00 Miscellaneous Position Fund 25

| Current   |       |        |              |         |         |          |          |         |      |         |                      |          |                                     |
|---|-------|--------|--------------|---------|---------|----------|----------|---------|------|---------|----------------------|----------|-------------------------------------|
| Effective Date: 11/01/2015                        |       |        |              |         |         |          |          |         |      |         |                      |          |                                     |
| COA   | Index | Fund   | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance Override | End Date | Remove                              |
| New   |       |        |              |         |         |          |          |         |      |         |                      |          |                                     |
| Effective Date: MM/DD/YYYY   11/01/2015           |       |        |              |         |         |          |          |         |      |         |                      |          |                                     |
| COA   | Index | Fund   | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance Override | End Date | Remove                              |
| 1   |       | 108601 | 41211        | 61300   | 0605    |          |          |         |      | .00     |                      |          | <input checked="" type="checkbox"/> |
| 1   |       | 108522 | 4021         | 61300   |         |          |          |         |      | 100     |                      |          | <input type="checkbox"/>            |
|   |       |        |              |         |         |          |          |         |      |         |                      |          | <input type="checkbox"/>            |
|   |       |        |              |         |         |          |          |         |      |         |                      |          | <input type="checkbox"/>            |
| Total:  |       |        |              |         |         |          |          |         |      | .00     |                      |          |                                     |
| Default from Index   <b>Save and Add New Rows</b> |       |        |              |         |         |          |          |         |      |         |                      |          |                                     |

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

Update Labor Distributions, 004026-00 Miscellaneous Position Fund 25

| Current                    |       |        |              |         |         |          |          |         |      |         |                      |          |
|----------------------------|-------|--------|--------------|---------|---------|----------|----------|---------|------|---------|----------------------|----------|
| Effective Date: 11/01/2015 |       |        |              |         |         |          |          |         |      |         |                      |          |
| COA                        | Index | Fund   | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance Override | End Date |
| 1                          |       | 108522 | 4021         | 61300   | 0501    |          |          |         |      | 100.00  |                      |          |
|                            |       |        |              |         |         |          |          |         |      |         |                      |          |
|                            |       |        |              |         |         |          |          |         |      |         |                      |          |
|                            |       |        |              |         |         |          |          |         |      |         |                      |          |
|                            |       |        |              |         |         |          |          |         |      |         |                      |          |
|                            |       |        |              |         |         |          |          |         |      | Total:  | 100.00               |          |

Default from Index    Save and Add New Rows

**5. Routing Queue**

Non Academic Affairs:

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

Academic Affairs

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

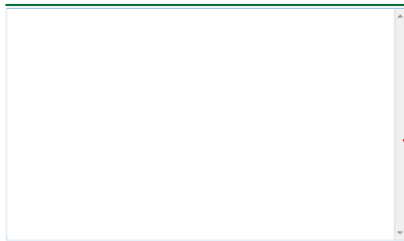


6. Click on the **“Save and Add New Rows”**.

**7. Comments**

- a. In the “Comments” section, enter comments for the approvers with an explanation for the action. Be sure to include the dates when the extra duties occurred.

Comment



Enter additional information here.

Comment

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

EXAMPLE of what a comment might contain.

**8. Save EPAF**

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

Electronic Personnel Action Form

✔ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

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

**9. Submit EPAF**

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

## Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Name and ID: Rylee Olivia Donovan, 900124058

Transaction: 876

Query Date: Nov 01, 2015

Transaction Status: Pending

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

### Error and Warning Messages

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

Warnings are acceptable.

#### ***Errors and Warning Messages***

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

\* - indicates a required field.

### Delete


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

# TERMINATION/RESIGNATION OF EMPLOYEE

## Accessing the EPAF Menu & Approver Summary

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

This EPAF should be used to terminate an employee's job when they are leaving the University. The steps below should be followed:

1. Enter the employee's 900# or click on the  magnifying glass to search for an employee's 900#.
2. The query date will default to today's date. Change the query date to the effective date of the termination/resignation. For example:
  - If an employee's last physical day at work is January 31, 2018, and personal leave time and/or comp are not being used, then January 31, 2018 will be used as the last day of employment and termination/resignation.
  - If an employee's last physical day at work is January 26, 2018, but plan on using personal leave time and/or comp time until January 31, 2018, then January 31, 2018 will be used as the last day of employment and termination/resignation.
3. Select **Termination from DSU (Non Academic Affairs)** or **Termination from DSU (Academic Affairs)** from the drop down approval category box.

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

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

### A LETTER OF RESIGNATION MUST BE SENT TO HUMAN RESOURCES FOR ALL EMPLOYEES VOLUNTARILY RESIGNING.

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


### !!! IMPORTANT !!!

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

#### New EPAF Person Selection

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

\* - indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category:

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

#### Employee Job Assignments

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

All Jobs

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

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

## New EPAF Job Selection

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

**ID:** Rylie Ann Clark, 900137172  
**Query Date:** Jan 31, 2018  
**Approval Category:** Termination from DSU NAA, D00010

### Terminate Job Only, C00003

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

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

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

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

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

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

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

### Terminate Employee from DSU

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

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

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

## 10. Routing Queue

### Non Academic Affairs:

- a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- b. **All EPAFs must have a Director and Vice President level approval.**

- c. Grants Termination from DSU, **all EPAFS must have a Director, Vice President, Grants, and Grants Budget Office**. This can be added to bottom of the queue. Other approval levels will default.
- d. **EXAMPLE ROUTING QUEUE:**
  - x. Dept (Director/Supervisor)
  - xi. Vice President
  - xii. HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
  - xiii. Budget = Beverly Lindsey (BLINDSEY)
  - xiv. Payroll FYI = Mary Ruth Phillips (MPHILLIPS)
  - xv. HR2 = Jasmine Cunningham (JCUNNINGHAM)
  - xvi. HR Director = Lisa Giger (LGIGER)
  - xvii. Super = Mary Ruth Phillips (MPHILLIPS)

Academic Affairs

- a. In the “Routing Queue” section, enter a User Name for each level of approver. Additional approver levels may be added with a ‘Required Action’ of ‘Approve’ or ‘FYI’ only.
- b. For Academic Termination from DSU, **all EPAFs must have a Chair and Dean level approval.**
- c. For Academic (Grants) Termination from DSU, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office**. Other approval levels will default.
- d. **EXAMPLE ROUTING QUEUE:**
  - xviii. Chair
  - xix. Dean
  - xx. Academic Affairs = Cheryl Ballard (CBALLARD)
  - xxi. Provost = Dr. Charles McAdams (CMCADAMS)
  - xxii. HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
  - xxiii. Budget = Beverly Lindsey (BLINDSEY)
  - xxiv. Payroll FYI = Mary Ruth Phillips (MPHILLIPS)
  - xxv. HR2 = Jasmine Cunningham (JCUNNINGHAM)
  - xxvi. HR Director = Lisa Giger (LGIGER)
  - xxvii. Super = Mary Ruth Phillips (MPHILLIPS)

11. Click on the **“Save and Add New Rows”**.

**12. Comments**

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

Comment

Enter additional information here.

Comment

Employee's last day is January 26, 2018; however, will be using personal leave time for January 29-31, 2018.

EXAMPLE of what a comment might contain.

### 13. Save EPAF

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

### Electronic Personnel Action Form

✔ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

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

### 14. Submit EPAF

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

Search

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

### Electronic Personnel Action Form

✔ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

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

### Error and Warning Messages

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

Warnings are acceptable.

### Delete

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

**TERMINATION/RESIGNATION PROCEDURE FOR INDIVIDUALS WHO ARE 9 MONTH EMPLOYEES**

**FACULTY EMPLOYEES**

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

**F1 Employee Class:** The job effective date will be ended on August 31, 2018; however, the last work date will be May 7, 2018 or the last day of the academic session.

**F2 Employee Class:** The job effective date will be ended on May 31, 2018; however, the last work date will be May 7, 2018 or the last day of the academic session.

**A LETTER OF RESIGNATION MUST BE SENT TO HUMAN RESOURCES FOR ALL EMPLOYEES VOLUNTARILY RESIGNING.**

**EXAMPLE OF A TERMINATION/RESIGNATION OF AN F1 EMPLOYEE TERMINATION**

**View Employee Employment Class**

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

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

| Item                                      | Current Value | New Value                               |
|---|---------------|---|
| Jobs Effective Date: MM/DD/YYYY *         | 09/01/2015    | <input type="text" value="08/31/2018"/> |
| Job Status: *(Not Enterable) Active       |               | <input type="text" value="T"/>          |
| Job Change Reason: *(Not Enterable) PROMO |               | <input type="text" value="TERM"/>       |

**Terminate Employee from DSU**

| Item                           | Current Value | New Value                                 |
|--------------------------------|---------------|---|
| Last Work Date: MM/DD/YYYY *   |               | <input type="text" value="05/07/2018"/>   |
| Term Reason Code: *            |               | <input type="text" value="V, Voluntary"/> |
| Termination Date: MM/DD/YYYY * |               | <input type="text" value="08/31/2018"/>   |

**EXAMPLE OF A TERMINATION/RESIGNATION OF AN F2 EMPLOYEE TERMINATION**

**View Employee Employment Class**

| Item   | Current Value | New Value                      |
|--|---------------|--------------------------------|
| Employee Class Code: (Not Enterable) F2, Faculty 9/9 |               | <input type="text"/>           |
| Employee Status: *(Not Enterable) Active             |               | <input type="text" value="A"/> |

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

| Item                                      | Current Value | New Value                               |
|---|---------------|---|
| Jobs Effective Date: MM/DD/YYYY *         | 09/01/2015    | <input type="text" value="05/31/2018"/> |
| Job Status: *(Not Enterable) Active       |               | <input type="text" value="T"/>          |
| Job Change Reason: *(Not Enterable) RAISE |               | <input type="text" value="TERM"/>       |

**Terminate Employee from DSU**


| Item                           | Current Value | New Value                                 |
|--------------------------------|---------------|---|
| Last Work Date: MM/DD/YYYY *   |               | <input type="text" value="05/07/2018"/>   |
| Term Reason Code: *            |               | <input type="text" value="V, Voluntary"/> |
| Termination Date: MM/DD/YYYY * |               | <input type="text" value="05/31/2018"/>   |

# UPDATE LABOR DISTRIBUTIONS

## Accessing the EPAF Menu & Approver Summary

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

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

10. Enter the employee's 900# or click on the  magnifying glass to search for an employee's 900#.
11. The query date will default to today's date. Change the query date to the effective date of the change. For faculty/staff paid monthly, this will usually be the first day of the month in which the change takes effect; for hourly employees on bi-weekly payroll, this will usually be the first day of the next bi-weekly pay period. For some grants, however, this will be another date.  
 EXAMPLE: 09/01/2017 (Monthly) OR 06/16/2017 (BW13) OR 09/29/2017 (Grant start date)
12. Select **Job Labor Distribution Change (Non Academic Affairs)** or **Job Labor Distribution Change (Academic Affairs)** from the drop down approval category box.

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


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

### !!! IMPORTANT !!!

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

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

\* - indicates a required field.

ID:   

Query Date: MM/DD/YYYY

Approval Category:

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

#### Employee Job Assignments

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

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

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



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

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

**Update Labor Distributions, C00010**

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

All Jobs

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

**Update Labor Distributions, 000376-00 Grants Coordinator**

| Current                    |       |      |              |         |         |          |          |         |      |         |             |                   |
|----------------------------|-------|------|--------------|---------|---------|----------|----------|---------|------|---------|-------------|-------------------|
| Effective Date: 01/01/2017 |       |      |              |         |         |          |          |         |      |         |             |                   |
| COA                        | Index | Fund | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance | Override End Date |
| 1                          |       | 10   | 4113         | 61300   | 0605    |          |          |         |      | 100.00  |             |                   |

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

| New                                   |       |      |              |         |         |          |          |         |      |         |             |                   |
|---------------------------------------|-------|------|--------------|---------|---------|----------|----------|---------|------|---------|-------------|-------------------|
| Effective Date: MM/DD/YYYY 06/01/2017 |       |      |              |         |         |          |          |         |      |         |             |                   |
| COA                                   | Index | Fund | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance | Override End Date |
| Q 1                                   |       | Q 10 | Q 4113       | Q 61300 | Q 0605  | Q        |          |         |      | 100.00  |             |                   |
| Q                                     |       | Q    | Q            | Q       | Q       | Q        |          |         |      |         |             |                   |
| Q                                     |       | Q    | Q            | Q       | Q       | Q        |          |         |      |         |             |                   |
| Q                                     |       | Q    | Q            | Q       | Q       | Q        |          |         |      |         |             |                   |
| Q                                     |       | Q    | Q            | Q       | Q       | Q        |          |         |      |         |             |                   |
| <b>Total:</b>                         |       |      |              |         |         |          |          |         |      | 100.00  |             |                   |

Defaulting values for Labor Distribution from the Job records.

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

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

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

| COA    | Index | Fund   | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance Override End Date | Remove                   |
|--------|-------|--------|--------------|---------|---------|----------|----------|---------|------|---------|-------------------------------|--------------------------|
| 1      |       | 10     | 4113         | 61300   | 0605    |          |          |         |      | 75.00   |                               | <input type="checkbox"/> |
| 1      |       | 340231 | 4113         | 61300   | 0605    |          |          |         |      | 25.00   |                               | <input type="checkbox"/> |
|        |       |        |              |         |         |          |          |         |      |         |                               |                          |
|        |       |        |              |         |         |          |          |         |      |         |                               |                          |
|        |       |        |              |         |         |          |          |         |      |         |                               |                          |
|        |       |        |              |         |         |          |          |         |      |         |                               |                          |
| Total: |       |        |              |         |         |          |          |         |      | 100.00  |                               |                          |

Default from Index | Save and Add New Rows

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

| COA    | Index | Fund   | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance Override End Date | Remove                   |
|--------|-------|--------|--------------|---------|---------|----------|----------|---------|------|---------|-------------------------------|--------------------------|
| 1      |       | 340231 | 4113         | 61300   | 0605    |          |          |         |      | 100.00  |                               | <input type="checkbox"/> |
|        |       |        |              |         |         |          |          |         |      |         |                               |                          |
|        |       |        |              |         |         |          |          |         |      |         |                               |                          |
|        |       |        |              |         |         |          |          |         |      |         |                               |                          |
| Total: |       |        |              |         |         |          |          |         |      | 100.00  |                               |                          |

Default from Index | Save and Add New Rows

9. Click "Save and Add New Rows"

**11. Routing Queue**

Non Academic Affairs:

- e. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- f. **All EPAFs must have a Director and Vice President level approval.**
- g. Grants One-Time Payment – Extra Services, **all EPAFs must have a Director, Vice President, Grants, and Grants Budget Office.** This can be added to bottom of the queue. Other approval levels will default.
- h. **EXAMPLE ROUTING QUEUE:**
  - xxviii. Dept (Director/Supervisor)
  - xxix. Vice President
  - xxx. HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
  - xxxi. Budget = Beverly Lindsey (BLINDSEY)
  - xxxii. Payroll = Mary Ruth Phillips (MPHILLIPS)
  - xxxiii. HR Director = Lisa Giger (LGIGER)
  - xxxiv. Super = Mary Ruth Phillips (MPHILLIPS)

## Academic Affairs


- e. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- f. For Academic One-Time Payment – Extra Services, **all EPAFs must have a Chair and Dean level approval.**
- g. For Academic Grants One-Time Payment – Extra Services, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office.** Other approval levels will default.
- h. For Academic One-Time Payment – Extra Services Continuing Education, add **Dean, Graduate and Continuing Education and Continuing Education (Marilyn Read).** This can be added to the bottom of the queue.
- i. **EXAMPLE ROUTING QUEUE:**
  - xxxv. Chair
  - xxxvi. Dean
  - xxxvii. Academic Affairs = Cheryl Ballard (CBALLARD)
  - xxxviii. Provost = Dr. Charles McAdams (CMCADAMS)
  - xxxix. HRFYI – Human Resources FYI = Samantha Phillips (SMPHILLIPS)
    - xl. Budget = Beverly Lindsey (BLINDSEY)
    - xli. Payroll = Mary Ruth Phillips (MPHILLIPS)
    - xlii. HR Director = Lisa Giger (LGIGER)
    - xliii. Super = Mary Ruth Phillips (MPHILLIPS)

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

### 14. Comments

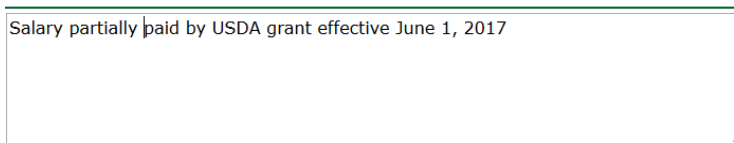
- b. In the "Comments" section, enter comments for the approvers with an explanation for the action.

Comment



Enter additional  
information here.

Comment



EXAMPLE of what a  
comment might  
contain.

### 14. Save EPAF

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

## Electronic Personnel Action Form

✓ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

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

**Transaction:** 3789

**Transaction Status:** Waiting

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

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

**Query Date:** Jun 01, 2017

**Last Paid Date:**

Save Submit Delete

### 15. Submit EPAF

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

## Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

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

**Transaction:** 3790

**Transaction Status:** Pending

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

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

**Query Date:** Jun 01, 2017

**Last Paid Date:**

## Error and Warning Messages

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

Warnings are acceptable.

## Delete


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

# CAMPUS ADDRESS CHANGES

## Accessing the EPAF Menu & Approver Summary

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

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

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

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

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

**!!! IMPORTANT !!!**


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

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

### New EPAF Person Selection

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

\* - indicates a required field.

ID: \* 900137172 | Rylie Ann Clark 

Query Date: MM/DD/YYYY \* 01/18/2018

Approval Category: \* Campus Address Change (Non Academic Affairs), D00023

Go

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

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

[Return to EPAF Menu](#)

RELEASE: 8.9.0.3

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

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

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

## Address Selection

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

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

### Terminate Current Campus Address

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

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

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

Show All Addresses

Next Approval Type

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

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

## Address and Telephone Selection

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

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

### Campus Address Add/Change

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

Click the circle beside NEW RECORD and then click GO.

Show All Addresses

Go

7. Under the section heading, **TERMINATE CURRENT CAMPUS ADDRESS**, enter the date to end the current or “old” campus address.
- Under the section heading, **CAMPUS ADDRESS ADD/CHANGE**, enter the effective date of the new campus address in the **ADDRESS FROM DATE** field.
  - Address Type: CA will default and cannot be change
  - Address Sequence No.: Leave Blank
  - Address Line 1: Enter the new campus address in this format. Do not abbreviate the campus addresses.
    - **EXAMPLE: DSU Box 3234 Ewing 190**  
Or if no DSU Box  
**Kent Wyatt Hall 247**
  - Address Line 2: CAMPUS will default, no entry needed
  - City: CLEVELAND will default, no entry needed
  - State: MS will default, no entry needed
  - Zip: 38733 will default, no entry needed
  - County: 006 will default, no entry needed
  - Nation: 157 will default, no entry needed
  - Telephone Type: CA will default, no entry needed
  - Area Code: 662 will default, no entry needed
  - Telephone Number: Enter the telephone number beginning with the prefix 846. A hyphen is not needed
    - **EXAMPLE: 8464500**

PLEASE SEE EXAMPLE BELOW.

**Terminate Current Campus Address**

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

Enter the end date of the current campus address in the format below  
**EXAMPLE: 01/18/2018**

**Campus Address Add/Change**

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

Enter the effective date of the new campus address in the format below  
**EXAMPLE: 01/19/2018**

## 8. Routing Queue

### Non Academic Affairs:

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

### Routing Queue

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

Save and Add New Rows

### Academic Affairs

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

### Routing Queue

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

Save and Add New Rows

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

### 10. Comments

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

Comment

Enter additional information here.



### 11. Save EPAF

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

## Electronic Personnel Action Form

✔ Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

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

### 12. Submit EPAF

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

## Electronic Personnel Action Form

✔ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

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

## Error and Warning Messages

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

Warnings are acceptable.

## Delete

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

# EPAF APPROVER

## Accessing the EPAF Menu & Approver Summary

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

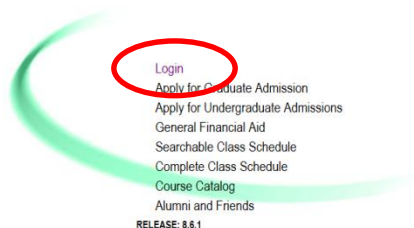
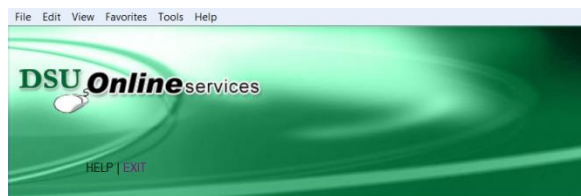
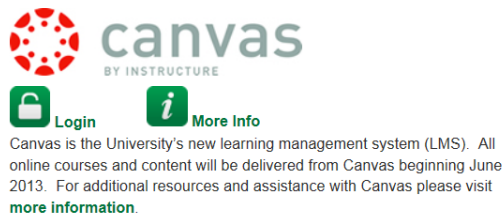
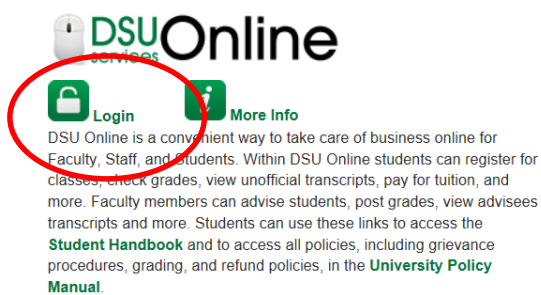
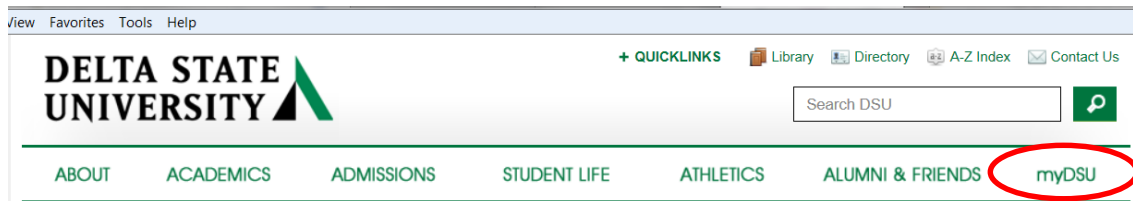
### Accessing EPAF menu in DSU Online Services

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

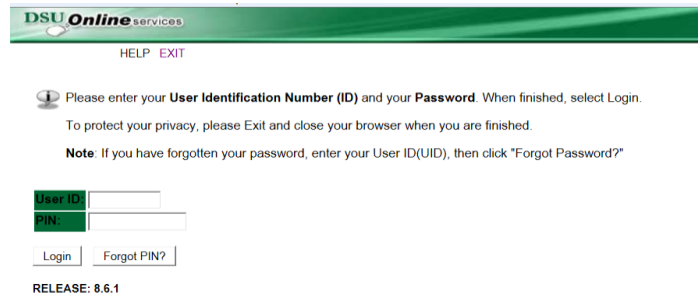
### Accessing Employee Self Service through DSU Online Services

Employee Self Service can be accessed through the DSU website:

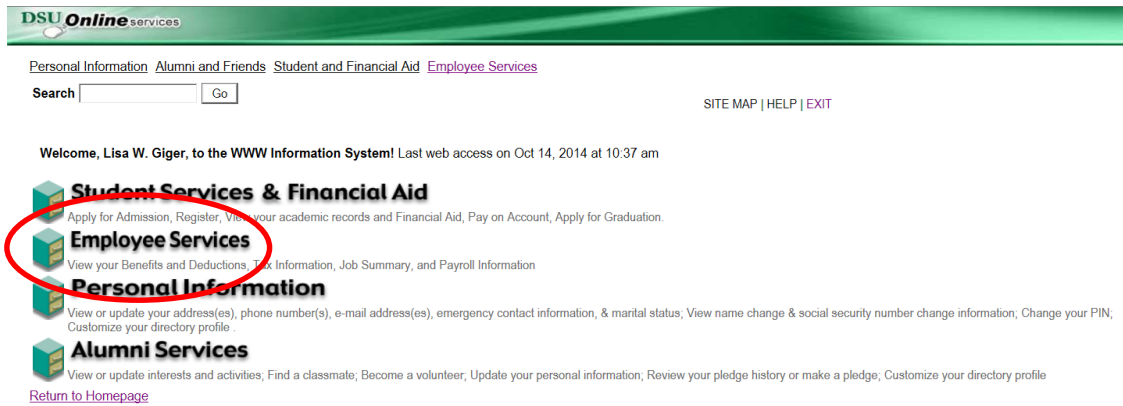
1. Open your internet browser on your computer.
2. Click on myDSU.
3. Click on Login under DSU online services.
4. Click on Login again to gain access to Employee Self Services.



5. Enter your 900# and password.



6. Click on Employee Services.



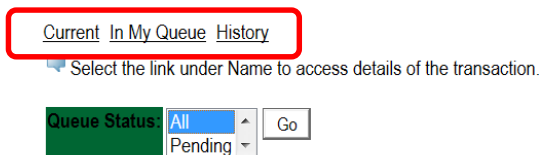
To approve an EPAF you first go and review the EPAF Approval Summary link. Once at the EPAF menu click on the EPAF Approver Summary link.

### Electronic Personnel Action Form



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

### EPAF Approver Summary



## The Current Link:

Displays transactions that with the following statuses:

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

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

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

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

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

Queue Status: All Pending

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

[Return to EPAF Menu](#)

### EPAF Transactions

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

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

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[Jump to Bottom](#)

### EPAF Transactions

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

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

## EPAF Approver Summary

Current In My Queue History

✔ 2 transaction(s) processed successfully.

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

Queue Status: All Go  
Pending

### Reviewing Your Work before Approving:

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

Select All   Reset   Save

1 - 25 of 31   Next   
 Jump to Bottom

#### EPAF Transactions

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

Once you click on the name link you will see the following:

The Approver has the capability of doing the following for EPAFs that are pending approval:

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

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

## EPAF Preview

✔ You are acting as an Approver.

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

**Transaction:** 54

**Transaction Status:** Pending

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

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

**Query Date:** Oct 08, 2014

**Last Paid Date:**

Next 🗑

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

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

### Routing Queue

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

### Transaction History

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

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

### Routing Queue

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

### Transaction History

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

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

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

Next 🗑

[Return to Top](#)

[EPAF Approver Summary](#)

## In My Queue Link

Displays transactions that with the following statuses:

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

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

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

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

| Current                    |       |      |              |         |         |          |          |         |      |         |             |                   |
|----------------------------|-------|------|--------------|---------|---------|----------|----------|---------|------|---------|-------------|-------------------|
| Effective Date: 10/01/2014 |       |      |              |         |         |          |          |         |      |         |             |                   |
| COA                        | Index | Fund | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance | Override End Date |
| 1                          |       | 10   | 3006         | 61200   | 0101    |          |          |         |      |         |             | 100.00            |

| New                        |       |      |              |         |         |          |          |         |      |         |             |                   |
|----------------------------|-------|------|--------------|---------|---------|----------|----------|---------|------|---------|-------------|-------------------|
| Effective Date: 10/08/2014 |       |      |              |         |         |          |          |         |      |         |             |                   |
| COA                        | Index | Fund | Organization | Account | Program | Activity | Location | Project | Cost | Percent | Encumbrance | Override End Date |
| 1                          |       | 10   | 3006         | 61200   | 0101    |          |          |         |      |         |             | 100.00            |

## The History Link

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

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

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

## Common EPAF Errors

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

### New EPAF Job Selection Page

#### ❖ Invalid Position Error

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

### Electronic Personnel Action Form Page

#### ❖ Missing Required Field

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

### Invalid Date Format

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

### Invalid Value

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

### Primary Job

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

### Missing User ID in Routing Queue

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