

## JB\_SAL EPAF

This EPAF is used for benefited employees.

JB\_SAL EPAFs are for those employees who have worked for USU at some point in the past (have a PEAEMPL record). Before beginning the JB\_SAL EPAF, there is some information you need to gather. Salaried employees each have a unique 99 position number, so you must find which one you're going to use.

### 1. Go to NBIPORG.

Type in your DP code and use today as a Query Date.

Position List By Organization NBIPORG 9.0 (ZDEVL)

COA: U Organization: DPPERS Human Resources Query Date: 02/01/2015

Go

Position numbers are listed at the left. Budget FTE indicates how many employees can use that position number. Job FTE indicates how many are currently using that position number. Write down the position number you intend to use. Now you have to find the Employee Class code.

Position List By Organization NBIPORG 9.0 (ZDEVL)

COA: U Organization: DPPERS Human Resources Query Date: 02/01/2015

Start Over

| Position * | Title                     | St... | Begin Date | End ... | Type | Budget F... | Job FTE | Annualized... |
|------------|---------------------------|-------|------------|---------|------|-------------|---------|---------------|
| 997478     | Accountant III            | A     | 07/01/2005 |         | S    | 1.0000      | 1.000   |               |
| 997544     | Associate Director        | A     | 07/01/2005 |         | S    | 1.0000      | 1.000   | 1.0000        |
| 997548     | Associate Director SR     | A     | 07/01/2005 |         | S    | 1.0000      | 1.000   | 1.0000        |
| P04092     | College Work Study        | A     | 07/01/2004 |         | P    | 99.0000     | 0.000   |               |
| 997545     | Coord Human Resources III | A     | 07/01/2005 |         | S    | 1.0000      | 1.000   | 1.0000        |
| 997540     | Coord Human Resources III | A     | 07/01/2005 |         | S    | 1.0000      | 1.000   | 1.0000        |

### 2. Go to NBAPOSN

Enter Position Number at the top and select Next Block. Note the Employee Class code.

Position Definition NBAPOSN 9.0 (ZDEVL)

Position Number: \* 997540

Go

Position Definition NBAPOSN 9.0 (ZDEVL)

Position Number: 997540 Start Over

| Position                        | Comments                            | Regulatory            |
|---------------------------------|-------------------------------------|-----------------------|
| POSITION DEFINITION             |                                     |                       |
| Position Status                 | Active                              | Type                  |
| Position Begin Date             | 07/01/2005                          | Position End Date     |
|                                 |                                     | COA                   |
|                                 |                                     | U                     |
| COMPENSATION AND CLASSIFICATION |                                     |                       |
| Position Class *                | 50028 ... Coord Human Resources III | Bargaining Unit       |
| Position Title                  | Coord Human Resources III           | Job Location          |
| Employee Class *                | SN ... Staff Non-Exempt             | Appointment Percent * |
|                                 |                                     | 100.00                |

3. Access NOAEPAF screen

Electronic Personnel Action NOAEPAF 9.1 (ZDEVL)

Pending Change:  Go

ID: A02214575 ... + Proxy For:

Han Solo Transaction:

Query Date: 02/02/2016 Last Paid Date:

Approval Category: JB\_SAL ... Approval Type: JB\_S ...

Job Assign. Salaried w/Benefit Salary Job Process

Position: 997540 ... Suffix: 00 ...

Coord Human Resources III

**ID:** Enter in employee's Banner A#

**Transaction Number:** Just tab past the transaction field. Banner will generate the transaction number after you save the first page (approval type).

**Query Date:** The date the employment is to begin. Query date should match or be prior to the Job Effective Date and Job Begin Date in the next part of the EPAF. You may find it is easier if the Query Date, Job Effective Date and Job Begin Dates are the same.

**Approval Category:** JB\_SAL – Job Assign. Salaried w/benefits

**Approval Type:** JB\_S Salary Job Process

**Position Number:** Type the position number in the field. (Unique 99XXXX number from NBIPORG).

**Suffix:** Click on the search ellipse and then on List of Employee's Jobs (NBIJLST). **Click** Start Over (F5) and change your Query Date to 01-JUL-2005. Then click Go / Next Section (Alt+PgDn). Look to see if this person has ever had the same position number before. If so, use the next incremental number. (For example, if the person has a suffix for this position of 02, you'd use 03.)

4. Next Section / Go (Alt+PgDn).

When creating a new job for an employee, your Current Value column should always be blank. If there is information in your Current Value column when you're creating a new job, you're using an incorrect EPAF or suffix.

5. Enter the job information in the **New Value column**.

Electronic Personnel Action NOAEPAF 9.1 (ZDEVL) 1

Pending Change:  Proxy For: ID: A02214575 Han Solo Transaction: 1065339 Waiting Start Over

Query Date: 02/02/2016 Last Paid Date:

Approval Category: JB\_SAL Job Assign. Salaried w/Benefit Approval Type: JB\_S Salary Job Process

Position: 997540 Coord Human Resources III Suffix: 00

| Transaction  | Default Earnings     | Job Labor Distribution | Routing                   | Other Information and Comments |
|--|----------------------|------------------------|---------------------------|--------------------------------|
| TRANSACTION <span style="float: right;">+ Insert - Delete Copy Filter</span> |                      |                        |                           |                                |
| Field Status   | Field Name           | Current Value          | New Value                 |                                |
|  | Jobs Effective Date* |                        | 02/02/2016                |                                |
|  | Personnel Date       |                        | 02/02/2016                |                                |
|  | Job Begin Date*      |                        | 02/02/2016                |                                |
|  | Contract Type*       |                        | P                         |                                |
|  | Title                |                        | Coord Human Resources III |                                |
|  | FTE                  |                        | 1                         |                                |
|  | Appointment Percent* |                        | 100                       |                                |
|  | Salary*              |                        | 360000                    |                                |
|  | Job Location*        |                        | MAIN                      |                                |
|  | Job Change Reason*   |                        | E1                        |                                |
|  | Timesheet Orgn*      |                        | DPPERS                    |                                |

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- Job Effective Date:** Date employment begins. This date must be the same as the query date.
- Personnel Date:** This date typically matches the job query and job effective date, but can be different if it needs to indicate date of actual change/employment beginning. (i.e. If 2/1/14 was a Saturday so the employee actually began on 2/3/14 but I wanted her to get the entire month's paycheck, therefore beginning her job on 2/1/14.)
- Job Begin Date:** This must be the same as the job effective date and job query date.
- Contract Type:** "P" (Primary) is defaulted. Always use "P" for new hires.
- Title:** Title must match the one indicated by the position number. If this title needs to change, work with HR.
- FTE:** Full-time equivalent. 1 for full time, .75 for 75% time, etc. The FTE does not affect salary, but it does affect the benefit rate charged to your department.
- Appointment Percent:** Enter the appointment percent for the position. This does affect the salary. Enter as 100, 75, 50, etc.
- Salary:** The monthly amount the employee will be paid, multiplied by 12.
- Job Location:** Main (Main campus is the default but it can be changed to different location by clicking on the arrow under "New value" at the top of the column.)
- Job Change Reason:** E1 will default for Job Change Reason (New Hire). You can change it by clicking on the arrow beneath "New Value" to see a list of codes. Select the appropriate code and click on it to put it in the field.

**Timesheet Orgn:** (Note you have to scroll down to view this field.) Enter your home department DP-code. (Example: DPMATH)

6. **Save** by pressing F10 or clicking on the save icon
7. **Click** on the **Tools** menu and select **Next Action**.

Notice your Approval Type changing as you proceed to the next step in the EPAF

Electronic Personnel Action NOAEPAF 9.1 (ZDEVL)

Pending Change:

Proxy For:

ID: A02214575

Transaction: 1065339

Han Solo

Waiting

Query Date: 02/02/2016

Last Paid Date:

Approval Category: \* JB\_SAL

Approval Type: \* JB\_LBR

Job Assign. Salaried w/Benefit

Job Labor Distribution

Position: 997540

Suffix: 00

Coord Human Resources III

8. Click **Go** or **Next Section**.

Approval Category: JB\_SAL Job Assign. Salaried w/Benefit Approval Type: JB\_LBR Job Labor Distribution

Position: 997540 Coord Human Resources III Suffix: 00

| Transaction                    | Default Earnings | Job Labor Distribution | Routing     | Other Information and Comments |           |          |          |         |      |        |              |
|--------------------------------|------------------|------------------------|-------------|--------------------------------|-----------|----------|----------|---------|------|--------|--------------|
| CURRENT JOB LABOR DISTRIBUTION |                  |                        |             |                                |           |          |          |         |      |        |              |
| NEW JOB LABOR DISTRIBUTION     |                  |                        |             |                                |           |          |          |         |      |        |              |
| Effective Date * 02/02/2016    |                  |                        |             |                                |           |          |          |         |      |        |              |
| COA *                          | Index            | Fund *                 | Organiza... | Account *                      | Progra... | Activity | Location | Project | Cost | Perce  | Enc End Date |
| U                              | A06561           | 101164                 | E03832      | 625300                         | 6060      |          |          |         |      | 100.00 |              |
| Total P...                     |                  |                        |             |                                |           |          |          |         |      | 100.00 |              |

9. The Job Labor Distribution tab indicates which index(s) will pay for the position. A position may be paid from more than one index. Ensure that the accounting information is correct. Please ensure the Percent equals 100. Index numbers will be provided by your Business Officers. Fund, Organization, and Program numbers default when Index number is input. For the list of HR Account codes, click [HERE](http://hr.usu.edu/files/banner/hraccountcodes.pdf) (<http://hr.usu.edu/files/banner/hraccountcodes.pdf>).

**Effective Date:** This date needs to match the effective date in the previous sections and the query date.

10. **Save** by clicking F10 or clicking on the save icon on the bottom of the page on the right hand side

11. Click on the **Routing** tab.

Approval Category: JB\_SAL Job Assign. Salaried w/Benefit Approval Type: JB\_LBR Job Labor Distribution  
 Position: 997540 Coord Human Resources III Suffix: 00



| Transaction  | Default Earnings | Job Labor Distribution | Routing | Other Information and Comments |              |
|--|------------------|------------------------|---------|--------------------------------|--------------|
| ROUTING <span style="float: right;">+ Insert - Delete Copy   Filter</span> |                  |                        |         |                                |              |
| Originator ID: A01965767<br>Steven M Clark                                 |                  |                        |         |                                |              |
| Level Code *   | Level            | User ID                | Name    | Required Action *              | Queue Status |
| HHOME  | 20               |                        |         | Approval                       | In Queue     |
| DHOME  | 25               |                        |         | Approval                       | In Queue     |
| EXEC   | 50               |                        |         | Approval                       | In Queue     |
| HR   | 80               |                        |         | Approval                       | In Queue     |
| APPLY  | 95               |                        |         | Apply                          | In Queue     |

Routing indicates who must approve this EPAF before it is applied. The Level Codes will default for you, but you must fill in the approvers.

**User ID:** If you don't know the A numbers of your approvers, you must search for them by clicking search button under "User ID."

**HHOME:** Select your Department Head/Director.

**DHOME:** Select your Dean/VP.

**EXEC:** Select PRESIDENT\_OFFICE or PROVOST\_OFFICE.

**HR and APPLY:** These are routed to HR\_OFFICE.

12. **Save:** Press F10 or click on the save icon.

13. Click on the **Other Information and Comments** tab.

Approval Category: JB\_SAL Job Assign. Salaried w/Benefit Approval Type: JB\_LBR Job Labor Distribution  
 Position: 997540 Coord Human Resources III Suffix: 00



| Transaction  | Default Earnings | Job Labor Distribution | Routing | Other Information and Comments |
|--|------------------|------------------------|---------|--------------------------------|
| OTHER INFORMATION <span style="float: right;">+ Insert - Delete Copy   Filter</span>   |                  |                        |         |                                |
| COMMENTS <span style="float: right;">+ Insert - Delete Copy   Filter</span>  |                  |                        |         |                                |
| Comments: Hiring Han as a Human Resources Coordinator III. Start Date is 02/02/2016. Reg # 12345678. He will be paid 36,000 yearly. Leanna Lammert will be his supervisor.<br><br>Wendy 7/5652 |                  |                        |         |                                |
| 1 of 1   10 Per Page   Record 1 of 1   |                  |                        |         |                                |

**Add comments.** Explain what you are doing with this EPAF. The comments are what approvers rely on to know what an EPAF is for, so put all the information you can into the comments. **Include the requisition number used to hire this individual.** Include your name and phone number in case anyone has questions.

14. **Save:** Press F10 or click on the save icon.

15. To finish to EPAF, go back to the Transaction tab (or Tools > Transaction) and click on **Tools > Submit Transaction.**

The screenshot shows the 'Electronic Personnel Action NOAEPAF 9.1 (ZDEVL)' interface. A red arrow points to the gear icon in the top right corner. Another red arrow points to the 'Submit Transaction' button in the 'ACTIONS' dropdown menu. The main content area shows a table with columns 'Applied Status', 'Field Name', and 'Current Value'. Below the table is an 'APPROVER' section with an 'Approver Action' dropdown and a 'Queue Status' field.

16. **Check for a Pending Status.** When your EPAF is submitted, the transaction status will change to Pending and move to your first approver's queue. If it does not change to Pending, there is something keeping your EPAF from submitting. And an Errors screen will come up. If you cannot figure out why it won't submit, contact the HR Banner Help Desk.

The screenshot shows the same EPAF interface as above, but with a green notification box at the top right containing a checkmark icon and the text 'Transaction submitted.' The notification box is highlighted with a red border. The top right corner of the interface now shows a yellow tab with the number '1'.