

Electronic Personnel Action Forms (EPAF) for

1. Job Changes (JC_)

2. Labor Distribution Changes (P_LABR), (WS_LBR)

3. Employee Record Changes (EC_I9)

4. Informative View Screens

Electronic Approvals for Job Changes (JC_ & P_)

Electronic Approval Categories are the Personnel Action Form Packet. Before you start an electronic approval process, ask yourself what are you trying to do? Do you have an employee that has a change? Ask yourself what is the process you want to perform and choose from the categories below.

JC_ → Job Changes – This category is for position changes to the employee. For example: salary increase, change of title, or non-exempt to exempt status. The specific processes departments will use from this category are:

1. JC_LOA Leave of Absence – Used for Extended Leave of Absences
2. JC_MWH Monthly WH Change – To change monthly payment to WH
3. JC_SAL Salary change – To change the employee's salary, Appointment %, or FTE
4. JC_STC Status change – Use for Sabbatical leave only.
5. JC_TRM Terminated Job – Terminate an employee's position (job)
6. JC_WGH WH Change – To change hourly rates for hourly employees)
7. P_LABR Payroll Account Changes – To change payroll account distribution for employees
8. WS_LBR Payroll Account Changes for Work Study.

WS_LBR – To make Work Study Account Changes

DEFINITION of SUFFIX NUMBER – The suffix field is used to allow the employee to have more than one job with the same position number. For example: if the employee has two assignments at the same time in the same department at differing rates, the suffix # is used to distinguish between the different rates of pay. You can only use a suffix number once. For example, if 01 is used, use 02 and so forth.

- ✓ Example: Student Employee Primary Position (Peer Advisor) \$7.00/hr
Same Student second job in same department (grader) \$5.15/ hr suffix 01

To view positions and general information within a department:

1. Access NBIPORG
2. Enter in “DP” code for department, or search using the magnifying glass.
3. CTRL PG Down (Next Block)
4. Listed are the positions and FTE information

To view the employee(s) in the position:

1. Write down the position number.
2. click on X box in right hand corner and then from Main Menu Screen
3. Access NBIPINC and hit Enter. Put in position number in top block as indicated.
4. Next Block or CTRL Page Down and you will see the name and A # of the employee in the position.

JOB CHANGE LEAVE of ABSENCE (JC_LOA)

*This EPAF is used to send an employee on an extended leave of absence, more than 1 month.. Indicate necessary information by using transaction comments under OPTION. **DO NOT use this EPAF for Short-Term Disability.** (Note: Use **PHATIME** to enter in **SICK** or **VACATION** leave.)*

REMEMBER TO USE COMMENTS TO EXPLAIN THE LEAVE OF ABSENCE!!
See *Special Instructions* for changes in the leave of absence.

1. Access NOAEPAF screen.
2. Enter in employee Banner A#
 - a. Query Date (The date you are generating the EPAF) Note: The job effective date must be the query date or a date in the future. If you need
 - b. to make the job effective date the first and you are generating the EPAF on the 5th, change your query date to the 1st.
3. Approval Category select: JC_LOA – Job Change Leave of Absence
4. Approval Type defaults: JC_LOA – Leave of Absence
5. Position: Enter in employee's position number.
6. Suffix: Enter in the correct suffix number.
7. Ctrl Pg down.
8. Verify Screen: Enter in your password and click on verify.

Fill in the following information in the New Values column: (To navigate use the up/down arrow keys). Required Fields to submit the EPAF is marked with an asterisk (*).

9. *Job effective date (The first date of the pay period or when the change is effective. The job effective date is the query date or a date in the future.)
10. Personnel date (This is the date something should have happened if different then the job effective date – Past or future dates.)
11. *Job Status – Enter in the appropriate code (**only use these codes**) **Do Not Leave employee as A for Active**
Employee Status (**These are the appropriate choices for this EPAF**)
L - On Leave without Pay and without Benefits
B - On Leave without Pay and with Benefits
F - On Leave with Full Pay and Benefits
12. *Job Change Reason – Click on the magnifying glass for choices. A List of reason codes will appear towards the bottom of the list.
REMEMBER: IF you need Short Term Disability use the EC_STD EPAF and contact Sharon Hislop at 797-1815
13. *Timesheet Org.-- Home department (DPMATH)
14. F10 or save Icon.
15. Rollback and in approval type enter JC_LRT – Leave Return Date
16. Control Page Down
17. *Job effective date (This is the first day returning to work. The employee will return to regular pay/assignment on this day.)
18. Personnel date (This is the date something should have happened if different then the job effective date – Past or future dates.)
19. Job Status – “A” **defaults and cannot be changed.**
20. Job Change Reason – “ER” **defaults and cannot be changed.**
21. F10 or Save Icon.

22. Rollback and in approval type enter JB_LBR and control page down. Verify FOAP information and hit save or F10. The accounts must equal 100%.

When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:

1. Select *OPTIONS*
2. Choose *Routing Information* (A new window will appear)
3. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
4. SAVE
5. Select *Information/Comments Tab*.
 - a. Information/Comments Write a description of what you are doing
Comments are mandatory. Include your phone number in case approvers have questions.
6. Save
7. Select Options
8. Choose Submit Transaction

Special instructions:

1. **When the employee needs to extend their LOA**, submit another EPAF using the date of return to regular assignment as the new job effective date for the

leave. Example: Mary is to return on March 1st, 2006, but needs to extend her LOA until March 15th. Send another EPAF (JC_LOA) with March 5th as the new effective date of the leave in Approval type: JC_LOA.

2. **When the employee is returning early from a LOA,**
 - a. 1st call the HR OFFICE for record maintenance and then
 - b. 2nd submit a new EPAF (JC_LOA).

JC MWH To change the monthly lump sum for a Monthly Wage Hourly

This EPAF is used only to change the lump sum payment of a WH employee. For example John get \$150/mo. You want to change it to \$175/mo. **Hourly employees must record hours on a timesheet even if receiving a lump sum payment.**

1. Access NOAEPAF screen.
2. Enter in employee Banner A#
 - a. Query Date (The date you are generating the EPAF) Note: The job effective date must be the query date or a date in the future. If you need to make the job effective date the first and you are generating the EPAF on the 5th, change your query date to the 1st.
3. Approval Category select: JC_MWH – Job Change Monthly Wage Hourly
4. Approval Type defaults: JC_MWH – Monthly Wage Hourly Change
5. Position: Enter in employee's position number. P05xxx
6. Suffix: Enter in the correct suffix number.
7. Ctrl Pg down. Or Next Block icon. Verify Screen:
8. Enter in your password and click on verify.

Fill in the following information in the New Values column: (To navigate use the up/down arrow keys). Required Fields to submit the EPAF is marked with an asterisk *.

9. *Job effective date (The first date of the pay period or when hired. The job effective date is the query date or a date in the future.)
10. *Hourly/Monthly Rate – Enter monthly disbursement (“Lump Sum”). For example Sue gets \$150
11. *Pays and Factor – 1 **defaults and cannot be changed.**
12. *Units per Pay – 1 **defaults and cannot be changed**
13. *Time sheet Org: Enter in Department Code (DPMATH)
14. *SAVE – F10 or use the “save” icon
15. *Rollback and in approval type choose P_LABR and control page down. Verify FOAP information. The accounts must equal 100%.
16. *SAVE – F10 or use the “save” icon
17. *In Approval Type field choose P_EARN Default Earnings Process
18. *Effective Date: same as Jobs Effective Date used in step #9
19. *Enter HRL in next field under Earnings Code
20. *Enter 1 under HRS/Units
21. **DO NOT ENTER ANYTHING IN THE REMAINING FIELDS.**
22. *SAVE – F10 or use the “save” icon

23. In Approval Type field choose JC_TRM Assignment Termination Process
24. CTRL PG Down
25. *Job effective date **All dates in the termination piece of the EPAF refer to the last day of the job assignment or When the job going to end**(The last day of the pay period of the job assignment)
 - a. Note: Banner prorates the last payment if the termination date is before the last day of the pay cycle.
26. *Job end date (Same as Job effective date in #25).
27. *Personnel date (REQUIRED: The *actual last day* the employee worked in the job assignment)
28. *Job Status– defaults to T for job termination
29. *Job Change Reason – A6 (Termination of WH) defaults and cannot be changed.
30. *Timesheet Org – Home department (Example: DPMATH)
31. SAVE – F10 or use the “save” icon

When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:

1. Select *OPTIONS*
2. Choose *Routing Information* (A new window will appear)
3. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
4. SAVE
5. Select *OPTIONS*
 - a. Select Transaction Comments. Explain what you are doing in the EPAF and include your phone number in case approvers have questions.
6. Save
7. Select Options
8. Choose Submit Transaction

Salary Change Process (JC_SAL)

This EPAF is specifically for employee salary changes, to change FTE, Appointment percent, and title.

1. Access NOAEPAF screen.
2. Enter in employee Banner A#
 - a. Query Date (The date you are generating the EPAF) Note: The job effective date must be the query date or a date in the future. If you need to make the job effective date the first and you are generating the EPAF on the 5th, change your query date to the 1st.
3. Approval Category select: JC_SAL – Job Change Salary Change
4. Approval Type defaults: JC_SAL – Assignment Salary Change
5. Position: Enter in employee’s position number.
6. Suffix: Enter in the correct suffix number.

7. Ctrl Pg down. Or Next Block icon. Verify Screen:
8. Enter in your password and click on verify.

Fill in the following information in the New Values column: (To navigate use the up/down arrow keys). Required Fields to submit the EPAF is marked with an asterisk (*).

9. *Job effective date (The first date of the pay period or when the change is effective. The job effective date is the query date or a date in the future.)
10. Personnel date (This is the date something should have happened if different then the job effective date – Past or future dates.)
11. FTE – (Full Time Equivalent – .75 to 1 is FT Benefited and does not affect salary or Benefits. BELOW .75 affects the employee's benefits)
12. *Appointment Percent – Enter in the Appointment % for the position 100% for full time
13. *Base Salary – **Enter in the new value what is in the current value. For example if \$35000 is listed in current value put it in new value. Banner will compute the new salary based on new FTE and Appointment percent entered.** If you are changing just salary put in new value what the new salary will be: for example Jane is currently earning \$35000. Her new salary will be \$40000. Enter that into New Value.
14. *Job Change Reason – The magnifying glass lights up to allow you to code the reason for change.
15. Title: Enter title of the position. Only if it has changed.
16. *Timesheet Org – Home department (Example: DPMATH)
17. F10 to SAVE or Save icon.
18. Rollback and in approval type enter JB_LBR and control page down. Verify FOAP information. The accounts must equal 100%. The Effective date is the same as the Job effective date in step #9.

When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:

1. Select *OPTIONS*
2. Choose *Routing Information* (A new window will appear)
3. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
4. SAVE
5. Select *OPTIONS*
 - a. Select Information and Transaction Comments Tab.– Describe what you are doing with the EPAF. Put your telephone number so approvers can call you with any questions.
6. Save
7. Select Transaction Tab. Next Block or Ctrl Page Down Must be in bottom part of EPAF
8. Choose Options.
9. Select Submit Transaction

JC_STC Status Change EPAF

This EPAF is for putting faculty on sabbatical. FTE and Appointment percent are critical for this EPAF.

1. Access NOAEPAF screen.
2. Enter in employee Banner A#

- a. Query Date (The date you are generating the EPAF) Note: The job effective date must be the query date or a date in the future. If you need to make the job effective date the first and you are generating the EPAF on the 5th, change your query date to the 1st.
 3. Approval Category select: JC_STC– Job Change Status Change
 4. Approval Type defaults: JC_STC – Assignment Status Change
 5. Position: Enter in employee's position number.
 6. Suffix: Enter in the correct suffix number.
 7. Ctrl Pg down. Verify Screen:
 8. Enter in your password and click on verify.
- Fill in the following information in the New Values column: (To navigate use the up/down arrow keys). Required Fields to submit the EPAF is marked with an asterisk (*).
9. *Job effective date (The first date of when the change is effective. The job effective date is the query date or a date in the future.)
 10. Personnel date (This is the date something should have happened if different then the job effective date – Past or future dates.)
 11. Job status – “A “**defaults and cannot be changed.**
 12. *Job change: Choose either L4 Sabbatical leave w/Full Pay or L5 Sabbatical leave w/Partial pay
 13. FTE – (Full Time Equivalent – examples= .75 or .80
 14. *Appointment Percent – Enter in the Appointment % for the position. 75% or 80% , 90% or 100% percent of time on sabbatical leave.
 15. *Base Salary – *Enter the amount listed in the current value for Base Salary. For example: if the employee is currently paid \$25000 list in the new value \$25000. Banner will do the math calculations for you REFLECTING THE new FTE and Appointment Percent.*
 16. Title Change – Enter title of the position.
 17. Hours per pay – **ONLY** enter if hours per pay are changing.
 18. *Timesheet Org.-- Home department (DPMATH)
 19. Rollback and in approval type enter JB_LBR and control page down. Verify FOAP information. The accounts must equal 100%

When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:

1. Select *OPTIONS*
2. Choose *Routing Information* (A new window will appear)
3. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
4. SAVE
5. Select *OPTIONS*
6. Select Transaction Comments – Use the following template for comments.
 - a. Requesting sabbatical leave for the Academic year 2006-2007 at (80%) time to Go to China and count ants.
7. Save
8. Select Transaction Tab. Next Block or Ctrl Page Down - Must be in bottom part of EPAF
9. Choose Options.
10. Select Submit Transaction

Job Assignment Termination (JC_TRM)

JC_TRM is to terminate the employee's job assignment. You *must terminate* employee's jobs when they leave the department or leave the University. WH (Wage Hourly) jobs must be terminated as well as other job assignments.

1. Access NOAEPAF screen.
2. Enter in employee Banner A#
 - a. Query Date (The date you are generating the EPAF) Note: The job effective date must be the query date or a date in the future. If you need to make the job effective date the first and you are generating the EPAF on the 5th, change your query date to the 1st.
3. Approval Category select: JC_TRM – Job Change Termination
4. Approval Type defaults: JC_TRM – Assignment Termination Process
5. Position: Enter in employee's position number.
6. Suffix: Enter in the correct suffix number.
7. Ctrl Pg down. Or Next Block icon. Verify Screen:
8. Enter in your password and click on verify.

Fill in the following information in the New Values column: (To navigate use the up/down arrow keys). Required Fields to submit the EPAF is marked with an asterisk (*).

9. *Job effective date (The first date of when the change is effective. The job effective date is the query date or a date in the future.) **Job effective Date, Personnel Date and Job End Date all refer to the end of the employee's job assignments in the termination EPAF. Remember Banner always prorates.**
10. *Job end date (Same as job effective date In Step 9)
11. *Personnel date (REQUIRED: The actual last day the employee worked in the job assignment if different then step #9).
12. *Job Status –T (defaults for job assignment termination)
13. *Job Change Reason – Click on the search Icon to choose the appropriate reason
14. *Timesheet Org – Home department (Example: DPMATH)

When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:

1. Select *OPTIONS*
2. Choose *Routing Information* (A new window will appear)
3. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
4. SAVE
5. Select *OPTIONS*
 - a. Select Transaction Comments –
 - b. **If the employee is terminating the University and is in a benefited position you must indicate that in the comments so that benefits can be stopped by HR.** Note any annual leave payouts to be made to the employee on PHATIME include annual leave amounts. Explain what you are doing to the employee and put your phone number in case approvers have questions.
 - c. Save
 - d. Select Transaction Tab. Next Block or Ctrl Page Down Must be in bottom part of EPAF
 - e. Choose Options.
 - f. Select Submit Transaction

Job Change Wage Hourly Increase (JC_WGH)

JC_WGH is for increasing a wage hourly employee's hourly rate. Example: 5.15/hr to 5.50/hr. You cannot use this EPAF if the employee is paid on a monthly lump sum.

1. Access NOAEPAF screen.
2. Enter in employee Banner A#
 - a. Query Date (The date you are generating the EPAF) Note: The job effective date must be the query date or a date in the future. If you need to make the job effective date the first and you are generating the EPAF on the 5th, change your query date to the 1st.
3. Approval Category select: JC_WGH – Job Change Wage Hourly
4. Approval Type defaults: JC_WGH – Job Change Wage Hourly
5. Position: Enter in employee's position number. PO5xxx
6. Suffix: Enter in the correct suffix number.
7. Ctrl Pg down. Verify Screen:
8. Enter in your password and click on verify.

Fill in the following information in the New Values column: (To navigate use the up/down arrow keys). Required Fields to submit the EPAF is marked with an asterisk (*).

9. *Job effective date (The first date of when the change is effective. The job effective date is the query date or a date in the future.)
10. *Hourly/Monthly rate – Enter in new hourly rate
11. *Job Change Reason -- EH for Wage Hourly Increase Defaults into field. This can be changed by clicking on the Search Icon
12. *Timesheet Org – Home department (DPCODE)
13. Rollback and in approval type enter JB_LBR and control page down. Verify FOAP information. The accounts must equal 100%. The Effective date is the same as the Job effective date in step # 9.

When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:

1. Select *OPTIONS*
2. Choose *Routing Information* (A new window will appear)
3. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
4. SAVE
5. Select *OPTIONS*
6. Select Transaction Comments – Enter the following information in the text box:
 - g. Detail information about the EPAF and what you are trying to do. List your phone number.
7. Save
8. Select Options
9. Choose Submit Transaction

Payroll Account Changes (P_LABR)

P_LABR is used for changing future payroll accounts for a position. If there is a permanent change for Graduate Assistants, the department needs to insert GRAD for Graduate School in the Routing Screen. If errors occur, contact the HR Office.

1. Access NOAEPAF screen.
2. Enter in employee Banner A#
 - a. Query Date (The date you are generating the EPAF) Note: The job effective date must be the query date or a date in the future. If you need to make the job effective date the first and you are generating the EPAF on the 5th, change your query date to the 1st.
3. Approval Category select: P_LABR – Payroll Labor Change
4. Approval Type defaults: P_LABR Labor Distribution Process
5. Position: Enter in employee's position number.
6. Suffix: Enter in the correct suffix number.
7. Ctrl Pg down. Verify Screen:
8. Enter in your password and click on verify.

The Labor Distribution screen appears. Current information is located at the top.

9. Enter in new effective date at Bottom of the screen.
 - a. **The effective date is the date when the account changes will be effective. You cannot back date into previous pay period.**
 - b. To add additional records, put cursor in Index field and down arrow.
10. Enter in Index number and accounts. The total is the percentage of gross pay and the total of accounts must equal 100%.
11. If you made a mistake and need to delete an account, place cursor in the selected index field and shift F6.
12. Save (F10)

When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:

13. Select *OPTIONS*
14. Choose *Routing Information* (A new window will appear)
15. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
16. SAVE
17. Select *OPTIONS*
 - a. Select Transaction Comments – List the accounts you are changing and why. This is the user's electronic filing cabinet and can be referred to at a later date for easy reference.
18. Save
19. Select Options
20. Choose Submit Transaction

Payroll Account Changes (WS_LBR)

WS_LBR is used for changing payroll accounts for Work Study positions. The employee class code is WS (work study P04xxx). These are students who receive Federal College Work-study Program funding. Use this EPAF to make account changes to employees who are on Work Study.

21. Access NOAEPAF screen.
22. Enter in employee Banner A#
 - a. Query Date (The date you are generating the EPAF) Note: The job effective date must be the query date or a date in the future. If you need to make the job effective date the first and you are generating the EPAF on the 5th, change your query date to the 1st.
23. Approval Category select: WS_LBR Work Study Account Changes
24. Approval Type Labor Distribution Process
25. Position: Enter in employee's position number. Remember only P04xxx accounts can be changed on this EPAF.
26. Suffix: Enter in the correct suffix number.
27. Ctrl Pg down. Verify Screen:
28. Enter in your password and click on verify.

The Labor Distribution screen appears. Current information is located at the top.

29. Enter in new effective date at Bottom of the screen.
 - a. **The effective date is the date when the account changes will be effective. You cannot back date into previous pay period.**
 - b. To add additional records, put cursor in Index field and down arrow.
30. ***Student Employment wants the accounts left at 100%. Once Student Employment receives the EPAF they will automatically add the 75% account (from the Federal work study funding, and change users accounts to 25%.***
31. If you made a mistake and need to delete an account, place cursor in the selected index field and shift F6.
32. Save (F10) or Save Icon.

When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:

33. Select *OPTIONS*
34. Choose *Routing Information* (A new window will appear)
35. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
36. SAVE
37. Select *OPTIONS*
 - a. Select Transaction Comments – Describe what you are doing to the accounts and why. Include your phone number in case approvers have any questions.
38. Save
39. Select Options
40. Choose Submit Transaction

Electronic Approvals for Employment Changes (EC_)

This category is for employment changes and updates to the employee record.

This category covers Short Term Disability and when needing to update the employee's I-9 status or resubmitting the form.

Employee I-9 updates (EC_I9)

If the employee has not worked at the University for Two (2) years or more, or if a temporary visa has been renewed, the department is required to update the I-9 form. The department is required to send the I-9 form to the HR Office or Student Employment.

1. Access NOAEPAF and enter in employee's A#
2. Query Date (The date you are generating the EPAF)
3. Approval Category select: EC_I-9 I-9 update and the Approval Type defaults: EC_I-9 I-9 update
4. Verify Screen: Enter in your password and click on verify

The current information shows in the current value column. You enter in new data for in the new value column.

5. Form Indicator: Select the following: 1) R for Received, or 2) T for Temporary
6. I-9 Date: Enter in the date you received the I-9 information.
7. I-9 Expiration date: Use only if the I-9 is temporary.
8. F10 or Save

When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:

1. Select *OPTIONS*
2. Choose *Routing Information* (A new window will appear)
3. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
4. *SAVE*
5. Select *OPTIONS*
 - a. Select Transaction Comments – Explain what you are doing in the EPAF.
6. *Save*
7. *Select Options*
8. *Choose Submit Transaction*

Short Term Disability (EC_STD)

This Electronic Approval Action Form is only for employees who are eligible for Short Term Disability and not Personal leave. *You will still need to do the calculation sheet and fax it to Sharon Hislop at 1816 or email sharon.hislop@usu.edu. Remember to record leave for the first 10 days using the code of SIC or VAC (If recording these hours for the prior month use codes SIP or VAP). Any leave used in coordination with the disability (from the 11th day on), you will need to report as STT for Sick and/or STN for Vacation.*

1. Access NOAEPAF screen
2. Enter in employee Banner A#
3. Query Date (The date you are generating the EPAF)
 - a. Note: The job effective date must be the query date or a date in the future. If you need to make the job effective date the first and you are generating the EPAF on the 5th, change your query date to the 1st.
4. Approval Category: Choose EC_STD
5. Approval Type defaults: Type: JC_STD – Assignment STD Process

6. Position: Enter in Position number or search by clicking on the magnifying glass and choose List of Employee's Jobs.
7. Suffix: Enter in the suffix number
8. Ctrl Pg down (Next Block)
9. Verify Screen: Enter in your password and click on verify

Fill in the following information in the New Values column. To navigate use the up/down arrow keys. The current information shows in the current value column. You enter in the data for changes in the new value column.

10. Job effective date – Enter date of when the short term disability (STD) change is effective. If coordinating leave, this date should be the 11th day of disability date. If no leave is available for the 1st 10 days, the date needs to be the 1st day of disability. ***It cannot be backdated into last payroll cycle.***
11. Personnel date (The date it should have happened – Past or Future date)
12. Job Status is defaulted to B (On Leave without Pay and with Benefits)
13. Job Reason Code default to LS (Leave Short Term)
14. F10 to SAVE
15. Rollback and in approval type enter EC_STD – Employee Short Term Disability
16. Ctrl Pg down
17. Leave Reason Code – defaults to M4 (Leave w/pay partial benefits)
18. Leave Begin Date – Enter job effective date (same date for Number 10 above) for the Short Term Disability. If coordinating leave, this date should be the 11th day of disability date. If no leave is available for the 1st 10 days, the date needs to be the 1st day of disability. ***It cannot be backdated into last payroll cycle.***
19. Leave End Date – Enter job effective date for the last day of Short Term Disability. *Example: If the first day working is the 15th of the month, the leave end date is the 14th.*
20. Rollback and in approval type enter P_LABR
21. Ctrl Pg down (Next Block)
22. Enter in date Effective Date: The date of when short term disability begins. Verify FOAP information. The accounts must equal 100%
23. F10 to SAVE
24. Rollback and in approval type enter JC_STR – Return from Short Term Disability
25. Ctrl Pg down
26. Job effective date – The date of when the employee returns from STD
27. Personnel date – Put in the same date as the job effective date.
28. Job Status is defaulted to A (code for Active Status)
29. Job Reason Code default to ER (Return to Regular Pay/Assign)
30. F10 to SAVE

When finished with the last type do not roll back. You are ready to send the EPAF by following these steps:

1. Select *OPTIONS*
2. Choose *Routing Information* (A new window will appear)
3. Fill in the Approvers by typing in their username or select from the magnify glass to conduct a search.
4. SAVE
5. Select *OPTIONS*
 - a. Select Transaction Comments – Explain in detail what you are doing in the EPAF. List your phone number so Sharon can call you if she has questions.
6. Save
7. Select Options

8. Choose Submit Transaction

HR Banner Informative View Screens

To see if a person has an employee record in Banner:

1. Access PEAEMPL (Departments will only have query access to this screen. You cannot change any data.)
2. Enter in the persons Banner A-# (A0001234)
3. CTRL PG Down (Next Block)

OR in the Electronic Personnel Action Form (NOAEPAF)

1. Click on the search Icon next to the name field.
2. Select Employee Search
3. Follow basic search techniques as outlined in HR BANNER HANDOUTS 101

To view the Employee's position Number in Electronic Personnel Action Form (NOAEPAF)

1. Select the search icon next to the position field
2. In the options window select *List of Employee's Jobs*
3. Highlight the position you want to view
4. Click on the *Select Icon* with the White Arrow in the row of Icons

To view Employee Job History (pay rates, annual salary, payroll information, encumbrances, Home Department) In ONE screen:

1. Access screen PEIJHIS
2. Enter in Employee A-# and position number.
3. Ctrl Page Down (Next Block)
4. Information populates into the screen.
5. Scroll down to see additional information

To view Labor Distribution Accounts History:

1. Access screen NBIJLHS
2. Enter in employee A-# and position number.
3. Ctrl Page Down (Next Block)
4. To view a history of effective dates (Dates of changes to FOAPS), select Options and view effective dates. An option window appears with effective dates (past or future).
5. The window underneath shows the Job Labor Distribution Detailed information for the selected effective date.

To view Payroll Calendar Dates to see when the payroll cut off date is:

1. Access PTRCALN screen
2. F7 to clear screen
3. Enter in year and SA (salaried payroll) in payroll ID field
4. F8 to execute query

5. Dates of pay periods will populate
6. To see the last day to use as job effective date
 - a. Scroll the horizontal scroll bar to view *Web & Departmental Pay Period Time Entry Dates*. There are two columns, *From and To* with dates. The date in the "To" field is the "Pay Lock Date".

IMPORTANT

If the Job effective date and job begin dates are on or after this "Pay Lock Date", you will need to use the first day of the next pay period to process any electronic approvals.

To view positions and general information within a department:

5. Access NBIPORG
6. Enter in "DP" code for department, or search using the magnifying glass.
7. CTRL PG Down (Next Block)
8. Listed are the positions and FTE information

To view the employee(s) in the position:

5. Select the position number in NBIPORG
6. Click on the Select Icon (the big arrow) – Your screen will switch to the main screen of Banner.
7. Access NBIPINC
8. CTRL PG Down (Next Block)
9. Listed are the employees assigned to the position.