

Instructions for JB_SUM (AY Add on/ Summer Months)

This EPAF is used for up to three months of effort **within** the regular scope of the contract position that is in addition to the regular AY (Academic Year) assignment. This includes teaching, research and administrative duties. Use **P01XXX** for teaching or **P09XXX** for non-teaching.

When using this EPAF for Extra Contractual Service, please refer to and comply with Utah State University Policy 376. Click here for the [ESC form](#).

Use JB_ADJ for efforts that are **outside** of the regular scope of the contract position or are additional efforts beyond the three months AY Add-on/Summer.

Go to **NOAEPAF**.



ID: Enter in employee's A#.

Transaction Number: Banner will generate the transaction number after you save the first page.

Query Date: The Query Date should be the date of the employment.

Remember: Banner will automatically prorate the monthly payment if an employee starts on a day other than the first of the month. If an employee starts after the Banner deadlines but before the first of the new month, then the first day of the new month should be the Effective Date with a comment that retroactive pay is needed.

Approval Category: JB_SUM

Approval Type: Automatically populated to JB_SUM.

Position Number: P02XXX. You can use employee class SM to search for your position number.

Suffix: 00 for new assignments. 01, 02, 03...for additional assignments in the same department and position number. Check NBAJOBS and NBIJLST to ensure you are using the correct suffix. The query date will need to be 07/01/2005.

Select **Go** (Alt+PgDn)

Electronic Personnel Action NOAEPAF 9.3.11 (ZDEVL)

ADD RETRIEVE RELATED TOOLS

Pending Change: Proxy For: HR_OFFICE Office HR ID: A02340958 Severus Snape Transaction: Start Over

Query Date: 07/01/2020 Last Paid Date:

Approval Category: JB_SUM Job Assignment A/Y Addon/Sum Approval Type: JB_SUM Job Assignment A/Y Addon/Sum

Position: P02068 Summer Months Suffix: 00

Transaction	Default Earnings	Job Labor Distribution	Routing	Other Information and Comments
TRANSACTION				
Applied Status	Field Name	Current Value	New Value	Remc
	Jobs Effective Date		07/01/2020	
	Personnel Date			
	Job Begin Date		07/01/2020	
	Contract Type		S	
	Title			
	Salary			
	Job Change Reason		ES	
	Timesheet Orgn			

SAVE

New Value Column: Enter the job information in the corresponding sections.

Job Effective Date: Must be the same as Query Date.
Personnel Date: This date should reflect the actual begin date, if different from the Effective Date.
Job Begin Date: Must be the same as Query Date.
Contract Type: Defaulted to "S" (secondary).
Title: _____ of _____. The first blank has the length of time for this EPAF. The second blank has the length of time for the total summer months for the current fiscal year.
 Ex.: 1st EPAF: 1 of 1 Summer Months
 2nd EPAF: 1 of 2 Summer Months
 3rd EPAF: 1 of 3 Summer Months

 X of X Summer Months
 Y of (X+Y) Summer Months
 Z of (X+Y+Z) Summer Months

Salary: Additional summer pay times 12.
 See calculation example below:
 AY base of \$36000 divided by 9 is \$4000
 One month of summer will be paid \$4000.
 \$4000 divided by months worked (2) is \$2000
 \$2000 multiplied by 12 is \$24000.

Job Change Reason: Defaulted to ES.
Timesheet Orgn: Enter your home department DP-code. (Example: DPMATH)

Electronic Personnel Action NOAEPAF 9.3.11 (ZDEVL)

ADD RETRIEVE RELATED TOOLS

Pending Change: Proxy For: HR_OFFICE Office HR ID: A02340958 Severus Snape Transaction: 1251767 Waiting

Query Date: 07/01/2020 Last Paid Date:

Approval Category: JB_SUM Job Assignment A/Y Addon/Sum Approval Type: JB_SUM Job Assignment A/Y Addon/Sum

Position: P02068 Summer Months Suffix: 00

Transaction	Default Earnings	Job Labor Distribution	Routing	Other Information and Comments
TRANSACTION				
Applied Status	Field Name	Current Value	New Value	
P	Jobs Effective Date		07/01/2020	
P	Personnel Date		07/01/2020	

Submit Transaction
 Apply Transaction
 Cancel PAF
 Delete PAF
Next Action
 Routing

SAVE

Save (F10)
 Click on **Tools** and select **Next Action**.

Electronic Personnel Action NOAEPAF 9.3.11 (ZDEVL) ADD RETRIEVE RELATED TOOLS

Pending Change: Proxy For: HR_OFFICE Office HR ID: A02340958 Severus Snape Transaction: 1251767 Waiting Start Over

Query Date: 07/01/2020 Last Paid Date:

Approval Category: JB_SUM Job Assignment A/Y Addon/Sum Approval Type: P_LABR Labor Distribution Process

Position: P02068 Summer Months Suffix: 00

Transaction Default Earnings **Job Labor Distribution** Routing Other Information and Comments

▼ CURRENT JOB LABOR DISTRIBUTION Insert Delete Copy Filter

Effective Date 07/01/2020

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	E
Total Percent											100.00

Record 1 of 1

▼ NEW JOB LABOR DISTRIBUTION Insert Delete Copy Filter

Effective Date * 07/01/2020

COA *	Index	Fund *	Organization *	Account *	Program *	Activity	Location	Project	Cost	Percent *	E
U	A04385	101164	E03757	616500	1010					100.00	
Total Percent											100.00

Record 2 of 2

SAVE

Approval Type: Automatically changed to JB_LBR.
Click **Go** (Alt+PgDn).

Job Labor Distribution tab: This page indicates which index(s) will be charged for the position. A position may be paid from more than one index.

Effective Date (under the New Job Labor Distribution): This date defaults from the query date which is the effective date.

Index: It defaults to the index the position was created with. You can change it by typing over it and/or you can insert a second index.

Fund, Organization, and Program: Default when index number is entered.

Account Number: 616500

Total Percent: Must be equal 100.00.

Save (F10)

Click on **Tools** and select **Next Action**.

Electronic Personnel Action NOAEPAF 9.3.11 (ZDEVL) ADD RETRIEVE RELATED TOOLS

Pending Change: Proxy For: HR_OFFICE Office HR ID: A02340958 Severus Snape Transaction: 1251767 Waiting Start Over

Query Date: 07/01/2020 Last Paid Date:

Approval Category: JB_SUM Job Assignment A/Y Addon/Sum Approval Type: JC_TRM Assignment Termination Process

Position: P02068 Summer Months Suffix: 00

Transaction Default Earnings Job Labor Distribution **Routing** Other Information and Comments

▼ TRANSACTION Insert Delete Copy Filter

Applied Status	Field Name	Current Value	New Value	Remove
	Jobs Effective Date*			
	Job End Date*			
	Personnel Date*			
	Job Status*		T	
	Job Change Reason*		TC	
	Timesheet Orgn*			

SAVE

Approval Type: Automatically set to JB_TRM.

Job Effective Date and Job End Date: Last day of the pay period for the current summer assignment. Example: If you are splitting summer months over two months, and the effective date is 02/01/2020, this date would be 04/30/2020.

Termination dates refer to dates the job assignment ENDS. Remember that Banner prorates so if you want to pay a full month amount, put the last day of the month for the job to end.

Personnel Date: Last day employee actually worked.

Job Status: Defaulted to T (cannot be changed).

Job Change Reason: Defaulted to TC (cannot be change).

Timesheet Orgn: Enter the home department's DPcode.

Save the screen (F10 or green button on the bottom right).

Electronic Personnel Action NOAEPAF 9.3.11 (ZDEVL) ADD RETRIEVE RELATED TOOLS

Pending Change: Proxy For: HR_OFFICE Office HR ID: A02340958 Severus Snape Transaction: 1251767 Waiting Start Over

Query Date: 07/01/2020 Last Paid Date:

Approval Category: JB_SUM Job Assignment A/Y Addon/Sum Approval Type: JC_TRM Assignment Termination Process

Position: P02068 Summer Months Suffix: 00

Transaction Default Earnings Job Labor Distribution **Routing** Other Information and Comments

ROUTING Insert Delete Copy Filter

Originator ID: A01643366 Nicholle Jessica Johnson

Level Code *	Level	User ID	Name	Required Action *	Queue Status	Action Date
HHOME	20			Approval	In Queue	
DHOME	25			Approval	In Queue	
HR	80			Approval	In Queue	
APPLY	95			Apply	In Queue	

1 of 1 Per Page Record 1 of 4

SAVE

Click on **Routing** tab (next to the “Job Labor Distribution” tab). Routing indicates who must approve this EPAF.

Level Code: This default based on the EPAF category.
User ID: Enter approvers A#. You can search for them by clicking on the ellipses (...) after clicking in the field.
HHOME: Department Head/Director.
DHOME: Dean/VP.
HR: HR_OFFICE.
APPLY: HR_OFFICE.

Save (F10)

Electronic Personnel Action NOAEPAF 9.3.11 (ZDEVL) ADD RETRIEVE RELATED TOOLS

Pending Change: Proxy For: HR_OFFICE Office HR ID: A02340958 Severus Snape Transaction: 1251767 Waiting Start Over

Query Date: 07/01/2020 Last Paid Date:

Approval Category: JB_SUM Job Assignment A/Y Addon/Sum Approval Type: JC_TRM Assignment Termination Process

Position: P02068 Summer Months Suffix: 00

Transaction Default Earnings Job Labor Distribution Routing **Other Information and Comments**

OTHER INFORMATION Insert Delete Copy Filter

Created Date	03/09/2020	Originator ID	A01643366
Submitted Date		Submitter ID	
Application Date		Applied to Database	
		By	

COMMENTS Insert Delete Copy Filter

Comments

Base Salary: AY Base salary
Adding # for this EPAF summer months at \$ amount for this EPAF for (work performed and dates).
To be paid from start date to end date
For a grand total of # summer months including this EPAF Summer months.
At \$ total amount including this EPAF

Nicholle 7-1809

1 of 1 Per Page Record 1 of 1

Activity Date 03/09/2020 03:53:24 PM Activity User A01643366

SAVE

Click on **Other Information and Comments**

Comments: Every EPAF needs comments explaining why the EPAF is being submitted. These comments are vital for approvers. Provide information that the approvers might need in order to make a decision. Include your name and phone number.

Follow this format:

Base Salary: AY Base salary
Adding # for this EPAF summer months at \$ amount for this EPAF for (work performed and dates).
To be paid from start date to end date
For a grand total of # summer months including this EPAF Summer months.
At \$ total amount including this EPAF

Save (F10)

Electronic Personnel Action NOAEPAF 9.3.11 (ZDEVL)

Pending Change: Proxy For: ID: A02340948 Harry James Potter Transaction: 1251732 Waiting

Query Date: 02/25/2020 Last Paid Date:

Approval Category: . Approval Type: JB_LBR Job Labor Distribution

Position:

Transaction | Default Exchange | Job Labor Distribution | Routing | Other Information and Comments

TRANSACTION

Applied Status	Field Name	Current Value	New

APPROVER

Approver Action: None Queue Status

SAVE

Click on **Transaction** tab
Click on **Tools** and select **Submit Transaction**.

Electronic Personnel Action NOAEPAF 9.3.11 (ZDEVL)

Pending Change: Proxy For: ID: A02340948 Harry James Potter Transaction: 1251732 Pending Query Date: 02/25/2020 Last Paid Date: Start Over

Approval Category: . Approval Type: JB_LBR Job Labor Distribution Position: I Suffix: 00

Check for a Pending Status (next to the Transaction ID at the top of the EPAF). Pending means that the EPAF is now pending in the first approver's queue.

Electronic Approvals Error Message NOIEMSG 9.3.3 (ZDEVL)

Proxy For: [] Transaction Number: [1251731] Go

ID: A02340948 Harry James Potter Originator: A01643366

Category: Errors: Warnings:

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

Errors: If there is something missing or incorrect from the EPAF this page will pull up.

Click **Go** to see the listed errors.

Once errors are fixed in the EPAF submit the transaction again and check for a **Pending Status**.