

## NH\_SAL EPAF

Rev. 01/11/2016

This EPAF is used for benefited employees.

NH\_SAL EPAFs are for those employees who have never been employed at USU (no PEAEMPL record).

Before beginning the NH\_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. You also need to know the employee class.

Go to Position List by Organization (NBIPORG) to find the position number you plan to use. Go to NBAPOSN to find the employee class for that position.

Once you have this information, go back to NOAEPAF to create your EPAF.

The screenshot shows the 'Electronic Personnel Action NOAEPAF 9.1 (ZDEVL)' form. The header includes the Utah State University logo and navigation options like 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. The form fields are as follows:

Pending Change:	<input type="checkbox"/>	Proxy For:	<input type="text"/>	...
ID:	A02214570	Transaction:	<input type="text"/>	...
Query Date:	01/11/2016	Last Paid Date:	<input type="text"/>	...
Approval Category:	NH_SAL	Approval Type:	NE_PEA	PEAEMPL
Position:		Suffix:		

A green 'Go' button is located on the right side of the form.

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

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.

**Approval Category:** NH\_SAL – New Hire Salaried w/benefits (type of EPAF you're creating)

**Approval Type:** NE\_PEA - PEAEMPL (indicates "page" or "step" of EPAF – this will default)

BANNER will not allow you to enter the Position Number and Suffix now.

Next Section / Go (Alt+PgDn).

Electronic Personnel Action NOEPAF 9.1 (ZDEVL)

ADD RETRIEVE RELATED TOOLS

Pending Change:  Proxy For: ID: A02214570 Knew Gai Transaction: Query Date: 01/11/2016 Last Paid Date: Start Over

Approval Category: NH\_SAL New Hire Salaried W/Benefits Approval Type: NE\_PEA PEAEMPL Position: Suffix:

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
	Employee Class Code*		SE	
	Current Hire Date		01/11/2016	<input type="checkbox"/>
	Home COAS*		U	
	I9 Form Indicator*		R	
	I9 Date*		01/07/2016	<input type="checkbox"/>
	I9 Expiration Date			<input type="checkbox"/>
	Home Organization*		DPPERS	...

1 of 1 Per Page Record 7 of 7  
\* - indicates a required field. Press LIST for valid codes.

APPROVER Insert Delete Copy Filter

Approver Action: None Queue Status:

EDIT Record: 777 NORTRAN.NORTRAN\_VALUE [7] SAVE ellucian..

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.

Enter the job information in the New Value column.

**Employee Class Code:** (From NBAPOSN).

**Current Hire Date:** Must match query date.

**Home COAS:** Defaults to U and cannot be changed.

**I9 Form Indicator:** Select (R)eceived = US Citizen; (T)emporary = Non-US Citizen; (E)xempt=a person who works outside of the US or as a volunteer.

**I9 Date:** The date the I9 was signed. (If two different signature dates, use the latest one.)

**I9 Expiration Date:** Date of expiration for an employee on a temporary visa. Use only for employees on a temporary visa. You must put in date if I9 Form Indicator is a (T)emporary. Leave blank for US Citizens.

**Home Organization:** Department's unique "DP" code i.e. DPMATH for Math Dept.

**Save:** Press F10 or click on the save icon (bottom left).

Click Tools and select “Next Action”.

OR

Click **Start Over** or press F5. Change the Approval Type Field to **JB\_S**.

Electronic Personnel Action NOAEPAF 9.1 (ZDEVL)

Valid Approval Type Codes for Category Code

Type Code	Description	Sequence No
NE_PEA	PEAEMPL	1
JB_S	Salary Job Process	2
JB_LBR	Job Labor Distribution	3

Steps or pages of EPAF

Electronic Personnel Action NOAEPAF 9.1 (ZDEVL)

Pending Change:

ID: A02214570 ... + Knew Gai

Query Date: 01/11/2016

Approval Category: \* NH\_SAL ...

New Hire Salaried W/Benefits

Position: 994759 ...

Accounting Assistant Lead

Proxy For: ...

Transaction: 1065282 ... Waiting

Last Paid Date:

Approval Type: \* JB\_S ...

Salary Job Process

Suffix: 00 ...

Go

EDIT Record: 1/1 KEY\_BLOCK.SUFFIX [1] ellucian™

Banner will now require you to enter the position number and suffix before you can continue.

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

**Suffix:** Click on the search ellipse then click List of Employee’s Jobs (NBIJLST).

Electronic Personnel Action NOAEPAF 9.1 (ZDEVL)

Pending Change:

ID: A02214570

Query Date: 01/11/2016

Approval Category: NH\_SAL

Position: 994759

Proxy For:

Transaction: 1065282

Paid Date:

Approval Type: JB\_S

Suffix:

**Option List**

List of Employee's Jobs (NBIJLST)

Cancel

If it takes you directly to the filter page (Add Another Field...) Close (X) / Cancel the filter.

Employee Job Inquiry NBIJLST 9.0 (ZDEVL)

ID: A02214570 Knew Gai Query Date: 01/11/2016

Start Over

EMPLOYEE JOB INQUIRY

+ Insert - Delete Copy | Filter

Add Another Field ...

Clear All Go

DETAILS

+ Insert - Delete Copy | Filter

Effective ...	Job Status	Description	Employee...	Pay ID	COA	Organizat...	Job Chan...	Employer

Cancel SELECT

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.) If not, begin with suffix 00. (If creating an NH\_SAL EPAF, this screen should be blank.)

Employee Job Inquiry NBIJLST 9.0 (ZDEVL)

ID: A02214570 Knew Gai Query Date: 07/01/2005

Start Over

EMPLOYEE JOB INQUIRY

+ Insert - Delete Copy | Filter

Position *	Suffix *	Begin Date *	End Date	Job Type

Blank

1 of 1 | 9 Per Page | Record 1 of 1

To get back to NOAEPAF, just click the White X (top left) or Ctrl+Q. Then click Go / Next Section (Alt+PgDn).

Electronic Personnel Action NOAEPAF 9.1 (ZDEVL)

Pending Change:  Proxy For: ID: A02214570 Knew Gai Transaction: 1065282 Waiting

Query Date: 01/11/2016 Last Paid Date:

Approval Category: NH\_SAL New Hire Salaried W/Benefits Approval Type: JB\_S Salary Job Process

Position: 994759 Accounting Assistant Lead Suffix: 00

Applied Status	Field Name	Current Value	New Value
	Jobs Effective Date*		01/11/2016
	Personnel Date		01/11/2016
	Job Begin Date*		01/11/2016
	Contract Type*		P
	Title		Accounting Assistant Lead
	FTE		.75

SAVE

**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 2/1/13 was a Saturday so the employee actually began on 2/3/13 but I wanted her to get the entire month's paycheck, therefore beginning her job on 2/1/13.)

**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. Entered as a decimal. For example: 1 for full (100%) time, .75 for 75% time, etc. This affects the benefit rate charged to your department.

**Appointment Percent:** Enter the appointment percent for the position as a whole number. For example: 100 for full (100%) time, 75, 50, etc. This affects how leave is accrued.

**Salary:** The monthly amount the employee will be paid, multiplied by 12. Do not enter the institutional base salary unless their appointment percent is 100. For example, for a job that would pay \$40,000 at 100% time you'd enter 30000 if the appointment percent is 75, 20000 if the appointment percent is 50, etc.

**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)

**Save** by pressing F10 or clicking on the save icon or the File Pull-down Menu.

Click on the **Tools** menu and select **Next Action**. Click **Go or Next Section**. Notice your Approval Type changing as you proceed to the next step in the EPAF.

Electronic Personnel Action NOAEPAF 9.1 (ZDEVL)

ADD RETRIEVE RELATED TOOLS

Pending Change:  Proxy For:

ID: A02214570 Knew Gai Transaction: 1065282 Waiting

Query Date: 01/11/2016 Last Paid Date:

Approval Category: \* NH\_SAL New Hire Salaried W/Benefits

Approval Type: **JOB\_LBR** Job Labor Distribution

Position: 994759 Accounting Assistant Lead Suffix: 00

COA *	Index	Fund *	Organizatio...	Account *	Program *	Activity	Location	Project	Cost	Percent *	Enc End Date
	A33660	101164	E23667	615300	6060					100.00	
Total Per...										100.00	

1 of 1 Per Page Record 1 of 1

SAVE

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.

**Save** by clicking F10 or clicking on the save icon or the File Pull-down Menu.

Click on the Routing tab.

Electronic Personnel Action NOAEPAF 9.1 (ZDEVL)

Pending Change:  Proxy For: ID: A02214570 Knew Gai Transaction: 1065282 Waiting

Query Date: 01/11/2016 Last Paid Date:

Approval Category: NH\_SAL New Hire Salaried W/Benefits

Approval Type: JB\_LBR Job Labor Distribution

Position: 994759 Accounting Assistant Lead Suffix: 00

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

ROUTING + Insert - Delete Copy | Filter

Originator ID

Level Code *	Level	User ID	Name	Required Action *	Queue Status	Action Date
HHOME	20	A	B	Approval	In Queue	
DHOME	25	A	D	Approval	In Queue	
EXEC	50	PRESIDENT_OF...	Office President	Approval	In Queue	
HR	80	HR_OFFICE	Office HR	Approval	In Queue	
APPLY	95	HR_OFFICE	Office HR	Apply	In Queue	

SAVE

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. (For help in making your approvers default as well, contact the HR Banner Help Desk.)

**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.

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

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

The screenshot shows the top portion of the 'Electronic Personnel Action NOEPAF 9.1 (ZDEVL)' form. The header includes navigation buttons: ADD, RETRIEVE, RELATED, and TOOLS. Below the header, the form displays the following information:

- Pending Change:  Proxy For: ID: A02214570 Knew Gai Transaction: 1065282 Waiting
- Query Date: 01/11/2016 Last Paid Date:
- Approval Category: NH\_SAL New Hire Salaried W/Benefits
- Approval Type: JB\_LBR Job Labor Distribution
- Position: 994759 Accounting Assistant Lead Suffix: 00

The 'COMMENTS' section is expanded, showing a text area with the following content:

Hiring Knew Gai as an Accounting Assistant Lead. He will be working 75% time and will earn \$30,000 per year from E&G funding. Hired Under Req. 168160.

Will Smith 7-1234

At the bottom of the form, there is a 'SAVE' button and a status bar showing 'Activity Date 01/08/2016 09:24:54 AM Activity User A01965767'.

**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.

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

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 NOEPAF 9.1 (ZDEVL)' form with the 'Transaction' tab selected. The 'Transaction' status is highlighted in red and shows 'Pending'. The 'Tools' menu is open, and the 'Submit Transaction' option is highlighted in red.

The form displays the following information:

- Pending Change:  Proxy For: ID: A02214570 Knew Gai Transaction: 1065282 Pending
- Query Date: 01/11/2016 Last Paid Date:
- Approval Category: NH\_SAL New Hire Salaried W/Benefits
- Approval Type: JB\_LBR Job Labor Distribution
- Position: 994759 Accounting Assistant Lead Suffix: 00

The 'TRANSACTION' section is expanded, showing a table with the following columns: Applied Status, Field Name, Current Value, and New Value. The table is currently empty.

The 'APPROVER' section is also expanded, showing a table with the following columns: Name, Title, and Email. The table is currently empty.

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. If you cannot figure out why it won't submit, contact the HR Banner Help Desk.