APPROVAL CATEGORIES

New Employee – No previous job records / assignments:
    Hourly
    Hourly with End Date
    Monthly with End Date
    Monthly with No End Date
    Work Study

Add a Job Record – Employee is being assigned to this position for the first time:
    Hourly
    Hourly with End Date
    Monthly with End Date
    Monthly with No End Date
    Work Study

Change a Job Record – A change is needed to a current job record:
    Hourly
    Monthly
    Work Study

Reactivate a Job Record – Employee previously occupied this position:
    Hourly
    Hourly with End Date
    Monthly with End Date
    Monthly with No End Date
    Work Study

Update Labor Distribution Record

Terminate a Job Record

Terminate a Job Record and Employee

Exception to Normal Pay – Payments to an employee for something other than his/her normal payroll; payment to an employee if EPAF was submitted late and employee should have been paid on a previous payroll and was not; or adjustments to a payroll payment to an employee for a prior month:
    Create New Job
    Reactivate an Existing ENP Job

Transfer – Employee is transferring from one position on campus to another position on campus:
    Transfer to Hourly Job with No End Date
    Transfer to Hourly Job with End Date
    Transfer to a Salaried Job with No End Date
    Transfer to a Salaried Job with End Date
    Transfer to Work Study Job with No End Date

Key:
◇ - Dropdown box options
○ - Listed items for which a New Value can be entered
★ - Tip
Appendix:
A – Job Change Reason Codes List
B – Job Change Reason Codes and Earnings Codes Chart
C – ENP Date Chart
D – Suffix – Type of Payment Chart
NEW EMPLOYEE – HOURLY EMPLOYEE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.  Use % as the wildcard for searches.
3. Enter the Query Date (the date the action on the EPAF is to become effective).
4. Select Approval Category Hourly – New Employee, NWHRH.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
    If Employee Job Assignments are listed after clicking on the All Jobs button, STOP. You may have selected the wrong approval category.
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
    The Suffix is a combination of two alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.
8. Select the radio button for the new job, and click on Go.
9. In the Create/Change PEAPEMPL Record section, review the data in the Current Value column. Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate.
   ○ Employee Class Code
       Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
   ○ Current Hire Date
       The Current Hire Date is the date the employee is to begin working. This should be the same date as the Section 2 Certification date (employee’s first date of employment) from page 2 of Form I-9 and the hire date in E-Verify. If an employee begins working prior to the Current Hire Date / I-9 date / E-Verify date, this will result in federal compliance issues.
   ○ Home Organization
   ○ Benefit Category
10. Review the Job Begin Date (defaulted to Query Date) and change if appropriate.
     The Job Begin Date is the date the assignment begins (the first day the employee can start any time entry). For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
     For new employees, this date should be the same as the Jobs Effective Date.
11. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
     The Jobs Effective Date is the date this action will affect payroll. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
     For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.
12. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
     This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
     For all new hires, the Personnel Date should be the same date as the Section 2 Certification date (employee’s first date of employment) from page 2 of Form I-9 and the hire date in E-Verify.
13. Review the Contract Type (defaulted to Primary) and use the dropdown box to change if appropriate.
    ◊ Primary – The employee’s primary job.
    ◊ Secondary – Used to add an additional position for an employee.
    ◊ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
     Each employee can have only one Primary job.
14. Review the **Job Change Reason** (defaulted to 1NEW, New Hire) and use the dropdown box to change if appropriate.
   ✴ See the Job Change Reason Codes List in Appendix A for additional information.

15. Enter the New Value for:
   - Regular Rate – Employee’s Pay Rate per Hour.
   - FTE – Full-Time Equivalent. (✴ Must be 1.0 or less)
   - Hours Per Day – Number of hours employee will work per day.
   - Hours Per Pay – Number of hours employee will work per pay period.
   - Timesheet Organization – Department timesheet organization number.

16. Review **Time Entry Method** and change if appropriate.
   - Remove – Do not select Remove as the Time Entry Method field must be populated.
   - Payroll Time Entry – Do not select Payroll Time Entry.
   - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.).
   - Department Time Entry with Approvals – Used by OSU-CHS only.
   - Third Party with Approvals – TimePro, AiM, Kronos, etc.

17. Enter the new value for:
   - **Title**

18. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
   ✴ The Effective Date is the date this action will affect payroll.

19. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
   ✴ Chart (COA) MUST be X for the OSU System.
   ✴ Funding total must equal 100%.
   ✴ The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.

20. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   ✴ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

21. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

22. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

23. Review and then click on the Submit button.
   ✴ The routing process does not begin until you click on the Save button and then the Submit button.
NEW EMPLOYEE – HOURLY EMPLOYEE WITH END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name. 
   ✿ Use % as the wildcard for searches.
3. Enter the Query Date (the date the action on the EPAF is to become effective).
4. Select Approval Category New Hour Job With End Date, NWHRE.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section. 
   ✿ If Employee Job Assignments are listed after clicking on the All Jobs button, STOP. You may have 
   selected the wrong approval category.
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job. 
   ✿ The Suffix is a combination of two alpha and/or numeric characters. In most cases, the suffix used will 
   be 00. See Appendix D for Suffixes used to identify specific types of payments.
8. Select the radio button for the new job, and click on Go.
9. In the Create/Change PEAEMPL Record section, review the data in the Current Value column. Do not enter 
   information in the New Value column unless there is no Current Value for a field or if the Current Value in a 
   field is believed to be inaccurate.
   ○ Employee Class Code
     ✿ Additional information and a list of Banner Employee Class Codes may be found at: 
       http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
   ○ Current Hire Date
     ✿ The Current Hire Date is the date the employee is to begin working. This should be the same 
       date as the Section 2 Certification date (employee’s first date of employment) from page 2 of Form 
       I-9 and the hire date in E-Verify. If an employee begins working prior to the Current Hire Date / I-9 
       date / E-Verify date, this will result in federal compliance issues.
   ○ Home Organization
   ○ Benefit Category
10. Review the Job Begin Date (defaulted to Query Date) and change if appropriate. 
    ✿ The Job Begin Date is the date the assignment begins (the first day the employee can start any time 
      entry). For biweekly employees, enter the first day of the pay period for which the job record is to be 
      effective. 
    ✿ For new employees, this date should be the same as the Jobs Effective Date.
11. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate. 
    ✿ The Jobs Effective Date is the date this action will affect payroll. For biweekly employees, enter the first 
      day of the pay period for which the job record is to be effective. 
    ✿ For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.
12. Review the Personnel Date (defaulted to Query Date) and change if appropriate. 
    ✿ This date does not affect pay and serves as an information field for historical, audit, or reporting 
      purposes. 
    ✿ For all new hires, the Personnel Date should be the same date as the Section 2 Certification date 
      (employee’s first date of employment) from page 2 of Form I-9 and the hire date in E-Verify.
13. Review the Contract Type (defaulted to Primary) and use the dropdown box to change if appropriate. 
    ◊ Primary – The employee’s primary job. 
    ◊ Secondary – Used to add an additional position for an employee. 
    ◊ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who 
      teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car 
      allowance, etc.). 
    ✿ Each employee can have only one Primary job.
14. Review the **Job Change Reason** (defaulted to 1NEW, New Hire) and use the dropdown box to change if appropriate.  
   ✴ See the Job Change Reason Codes List in Appendix A for additional information.

15. Enter the New Value for:
   - **Regular Rate** – Employee’s Pay Rate per Hour.
   - **FTE** – Full-Time Equivalent.  (✴ Must be 1.0 or less)
   - **Hours Per Day** – Number of hours employee will work per day.
   - **Hours Per Pay** – Number of hours employee will work per pay period.
   - **Timesheet Organization** – Department timesheet organization number.

16. Review **Time Entry Method** and change if appropriate.
   - Payroll Time Entry – Do not select Payroll Time Entry.
   - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.).
   - Department Time Entry with Approvals – Used by OSU-CHS only.
   - Third Party with Approvals – TimePro, AiM, Kronos, etc.

17. Enter the new value for:
   - **Title**

18. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.  
   ✴ The Effective Date is the date this action will affect payroll.

19. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
   - **Chart (COA)** MUST be X for the OSU System.
   - Funding total must equal 100%.
   - The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.

20. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.
   - The Jobs Effective Date is the date this action will affect payroll. For biweekly employees, enter the last day of the pay period for which the terminate job record should be effective, and enter the actual last day of work as the Personnel Date.

21. Enter the **Personnel Date**.
   - This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.

22. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.  
   ✴ See the Job Change Reason Codes List in Appendix A for additional information.

23. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   - A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

24. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

25. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

26. Review and then click on the Submit button.  
   - The routing process does not begin until you click on the Save button and then the Submit button.

<table>
<thead>
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<th>Hours/Day</th>
<th>Hours/Pay</th>
<th>FTE</th>
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</thead>
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<td>80</td>
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</tr>
<tr>
<td>0.25</td>
<td>2</td>
<td>20</td>
</tr>
</tbody>
</table>

✴ Hours per day and hours per pay should be based on the FTE.
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✴ Use % as the wildcard for searches.
3. Enter the Query Date (the date the action on the EPAF is to become effective).
4. Select Approval Category Monthly with end date – New Employee, NWHRS.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✴ If Employee Job Assignments are listed after clicking on the All Jobs button, STOP. You may have selected the wrong approval category.
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✴ The Suffix is a combination of two alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.
8. Select the radio button for the new job, and click on Go.
9. In the Create/Change PEAEMPL Record section, review the data in the Current Value column. Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate.
   ○ Employee Class Code
     ✴ Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
   ○ Current Hire Date (defaulted to Query Date)
     ✴ The Current Hire Date is the date the employee is to begin working. This should be the same date as the Section 2 Certification date (employee’s first date of employment) from page 2 of Form I-9 and the hire date in E-Verify. If an employee begins working prior to the Current Hire Date / I-9 date / E-Verify date, this will result in federal compliance issues.
   ○ Home Organization
   ○ Benefit Category
10. Review the Job Begin Date (defaulted to Query Date) and change if appropriate.
    ✴ The Job Begin Date is the date the assignment begins.
    ✴ For new employees, this date should be the same as the Jobs Effective Date.
11. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
    ✴ The Jobs Effective Date is the date this action will affect payroll.
    ✴ For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.
12. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
    ✴ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
    ✴ For all new hires, the Personnel Date should be the same date as the Section 2 Certification date (employee’s first date of employment) from page 2 of Form I-9 and the hire date in E-Verify.
13. Review the Contract Type (defaulted to Primary) and use the dropdown box to change if appropriate.
    ◊ Primary – The employee’s primary job.
    ◊ Secondary – Used to add an additional position for an employee.
    ◊ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✴ Each employee can have only one Primary job.
14. Review the Job Change Reason (defaulted to 1NEW, New Hire) and use the dropdown box to change if appropriate.
    ✴ See the Job Change Reason Codes List in Appendix A for additional information.
15. Enter the new value as appropriate for:
16. Review the Effective Date (defaulted to Query Date) for the funding information and change if appropriate.  
   ✤ The Effective Date is the date this action will affect payroll.
17. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.  
   ✤ Chart (COA) MUST be X for the OSU System.  
   ✤ Funding total must equal 100%.  
   ✤ The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.
18. In the Terminate / End Pay Job Record Only section, enter the Jobs Effective Date.  
   ✤ The Jobs Effective Date is the date this action will affect payroll. Use the termination date – the last day the employee is scheduled to work in this position.
19. Enter the Personnel Date.  
   ✤ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
20. Review the Job Change Reason (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.  
   ✤ See the Job Change Reason Codes List in Appendix A for additional information.
21. Review the Job Status (defaulted to Terminated) and use the dropdown box to change if appropriate.  
   ◊ Remove – Do not select Remove as the Job Status field must be populated.  
   ◊ Active – Do not select Active for this section of this approval category as this section is used to terminate or end pay for this job record.  
   ◊ Leave without Pay, with Benefits  
   ◊ Leave without Pay, without Benefits  
   ◊ Leave with Pay, with Benefits  
   ◊ Leave with Partial Pay, with Benefits – Used for 60% LTD.  
   ◊ Terminated
22. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.  
   ✤ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
23. In the Comment box, enter comments with sufficient detail for the approvers to understand the changes to the job record.
24. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
25. Review and then click on the Submit button.
   ✴ The routing process does not begin until you click on the Save button and then the Submit button.
NEW EMPLOYEE – MONTHLY EMPLOYEE WITH NO END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✴ Use % as the wildcard for searches.
3. Enter the Query Date (the date the action on the EPAF is to become effective).
4. Select Approval Category Monthly no end date – New Employee, NWHR2.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✴ If Employee Job Assignments are listed after clicking on the All Jobs button, STOP. You may have selected the wrong approval category.
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✴ The Suffix is a combination of two alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.
8. Select the radio button for the new job, and click on Go.
9. In the Create/Change PEAEMPL Record section, review the data in the Current Value column. Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate.
   ○ Employee Class Code
   ✴ Additional information and a list of Banner Employee Class Codes may be found at:
     http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
   ○ Current Hire Date (defaulted to Query Date)
     ✴ The Current Hire Date is the date the employee is to begin working. This should be the same date as the Section 2 Certification date (employee’s first date of employment) from page 2 of Form I-9 and the hire date in E-Verify. If an employee begins working prior to the Current Hire Date / I-9 date / E-Verify date, this will result in federal compliance issues.
   ○ Home Organization
   ○ Benefit Category
10. Review the Job Begin Date (defaulted to Query Date) and change if appropriate.
    ✴ The Job Begin Date is the date the assignment begins.
    ✴ For new employees, this date should be the same as the Jobs Effective Date.
11. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
    ✴ The Jobs Effective Date is the date this action will affect payroll.
    ✴ For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.
12. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
    ✴ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
    ✴ For all new hires, the Personnel Date should be the same as the Section 2 Certification date (employee’s first date of employment) from page 2 of Form I-9 and the hire date in E-Verify.
13. Review the Contract Type (defaulted to Primary) and use the dropdown box to change if appropriate.
    ◇ Primary – The employee’s primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✴ Each employee can have only one Primary job.
14. Review the Job Change Reason (defaulted to 1NEW, New Hire) and use the dropdown box to change if appropriate.
    ✴ See the Job Change Reason Codes List in Appendix A for additional information.
15. Enter the new value as appropriate for:
○ **Annual Salary / Contract Amount** – Employee’s actual annual salary.
○ **Factor** – Used to calculate the amount per month to be paid.
  ✴ **Annual Salary (or Contract Amount) / Factor = Monthly Payment**
  ✴ As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for exempt staff members.
○ **Pays** – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)
  ✴ For all new hires, Factor = Pays. Payroll Services will update the Pays field if a faculty member completes a deferral agreement.
  ✴ Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.
○ **FTE** – Full-Time Equivalent. (✴ Must be 1.0 or less)
○ **Hours Per Day** – Number of hours employee will work per day.
○ **Hours Per Pay** – Number of hours employee will work per pay period.
  ✴ If the FTE for this employee is not 1.0, the Hours per Day and Hours per Pay (based on the FTE) MUST be entered.
○ **Timesheet Organization** – Department timesheet organization number.
○ **Title**

16. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
  ✴ The Effective Date is the date this action will affect payroll.
17. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
  ✴ Chart (COA) MUST be X for the OSU System.
  ✴ Funding total must equal 100%.
  ✴ The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.
18. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
  ✴ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
19. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
20. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
21. Review and then click on the Submit button.
  ✴ The routing process does not begin until you click on the Save button and then the Submit button.
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✴ Use % as the wildcard for searches.
3. Enter the Query Date (the date the action on the EPAF is to become effective).
4. Select Approval Category Work Study – New Employee, NWHWS.
5. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✴ If Employee Job Assignments are listed after clicking on the All Jobs button, STOP. You may have selected the wrong approval category.
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✴ The Suffix is a combination of two alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.
8. Select the radio button for the new job, and click on Go.
9. In the Create/Change PEAEMPL Record section, review the data in the Current Value column. Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate.
   ◊ Employee Class Code
     ✴ Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
   ◊ Current Hire Date
     ✴ The Current Hire Date is the date the employee is to begin working. This should be the same date as the Section 2 Certification date (employee’s first date of employment) from page 2 of Form I-9 and the hire date in E-Verify. If an employee begins working prior to the Current Hire Date / I-9 date / E-Verify date, this will result in federal compliance issues.
   ◊ Home Organization
   ◊ Benefit Category
10. Review the Job Begin Date (defaulted to Query Date) and change if appropriate.
    ✴ The Job Begin Date is the date the assignment begins (the first day the employee can start any time entry). For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
    ✴ For new employees, this date should be the same as the Jobs Effective Date.
11. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
    ✴ The Jobs Effective Date is the date this action will affect payroll. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
    ✴ For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.
12. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
    ✴ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
    ✴ For all new hires, the Personnel Date should be the same date as the Section 2 Certification date (employee’s first date of employment) from page 2 of Form I-9 and the hire date in E-Verify.
13. Review the Contract Type (defaulted to Primary) and use the dropdown box to change if appropriate.
    ◊ Primary – The employee’s primary job.
    ◊ Secondary – Used to add an additional position for an employee.
    ◊ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✴ Each employee can have only one Primary job.
14. Review the **Job Change Reason** (defaulted to 1NEW, New Hire) and use the dropdown box to change if appropriate.
   * See the Job Change Reason Codes List in Appendix A for additional information.

15. Enter the New Value for:
   - Regular Rate – Employee’s Pay Rate per Hour.
   - FTE – Full-Time Equivalent. (**Must be 1.0 or less**)
   - Hours Per Day – Number of hours employee will work per day.
   - Hours Per Pay – Number of hours employee will work per pay period.
   - Timesheet Organization – Department timesheet organization number.

16. Review **Time Entry Method** and change if appropriate.
   - Remove – Do not select Remove as the Time Entry Method field must be populated.
   - Payroll Time Entry – Do not select Payroll Time Entry.
   - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.).
   - Department Time Entry with Approvals – Used by OSU-CHS only.
   - Third Party with Approvals – TimePro, AiM, Kronos, etc.

17. Enter the new value for:
   - Title

18. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
   * The Effective Date is the date this action will affect payroll.

19. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
   - Chart (COA) MUST be X for the OSU System.
   - Funding total must equal 100%.
   - The Labor Distribution Percentage on each line must be between 0.01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.

20. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   * A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

21. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

22. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

23. Review and then click on the Submit button.
   * The routing process does not begin until you click on the Save button and then the Submit button.
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name. ✓ Use % as the wildcard for searches.
3. Enter the Query Date (the date the action on the EPAF is to become effective) in MM/DD/YYYY format.
4. Select Approval Category Hourly – Add Job Record, ADDJBH.
5. Review current assignments under the Employee Job Assignments section.
   ✓ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✓ If the employee was previously in this position, STOP. Are you reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended? If the answer is YES, continue with the Add a Job Record approval category; however, you must use a new suffix value for the position number. If the answer is NO, use the Reactivate a Job approval category rather than the Add a Job Record approval category.
   ✓ Review the Last Paid Date for each job assignments, and make a note of the most recent Last Paid Date for the employee.
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✓ The Suffix is a combination of 2 alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.
   ✓ If the employee has multiple current jobs in the same position (usually due to multiple rates of pay), start with a Suffix of 00, then use 01, 02, etc.
   ✓ If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended (see Step 5 above), use a one up on the Suffix originally used for the primary job you are reactivating (e.g., if the original Suffix used for the position was 00, use 01).
8. Select the radio button for the new job, and click on Go.
9. Review the Job Begin Date (defaulted to Query Date) and change if appropriate.
   ✓ The Job Begin Date is the date the assignment begins. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   ✓ This date should be the same as the Jobs Effective Date.
10. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
   ✓ The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date for the employee. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   ✓ The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.
   ✓ For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.
11. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
   ✓ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
12. Review the Contract Type (defaulted to Secondary) and use the dropdown box to change if appropriate.
   ◊ Primary – The employee’s primary job.
   ◊ Secondary – Used to add an additional position for an employee.
   ◊ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
   ✓ Each employee can have only one Primary job.
13. Review the **Job Change Reason** (defaulted to 1CURR, Concurrent Appointment) and use the dropdown box to change if appropriate.

    ✴ See the Job Change Reason Codes List in Appendix A for additional information.

14. Enter the new value as appropriate for:

   ○ **Regular Rate** – Employee’s Pay Rate per Hour.
   ○ **FTE** – Full-Time Equivalent. (**Must be 1.0 or less**)
   ○ **Hours Per Day** – Number of hours employee will work per day.
   ○ **Hours Per Pay** – Number of hours employee will work per pay period.
   ○ **Timesheet Organization** – Department timesheet organization number.

15. Review **Time Entry Method** and change if appropriate.

   ◊ **Remove** – Do not select Remove as the Time Entry Method field must be populated.
   ◊ **Payroll Time Entry** – Do not select Payroll Time Entry.
   ◊ **Employee Time Entry via Web** – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.).
   ◊ **Department Time Entry with Approvals** – Used by OSU-CHS only.
   ◊ **Third Party with Approvals** – TimePro, AiM, Kronos, etc.

16. Enter the new value for:

   ○ **Title**

17. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.

    ✴ The Effective Date is the date this action will affect payroll.

18. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.

    ✴ **Chart (COA) MUST be X for the OSU System.**
    ✴ **Funding total must equal 100.**
    ✴ The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.

19. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.

    ✴ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

20. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

21. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

22. Review and then click on the Submit button.

    ✴ The routing process does not begin until you click on the Save button and then the Submit button.

<table>
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<tr>
<th>FTE</th>
<th>Hours/Day</th>
<th>Hours/Pay</th>
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</tr>
<tr>
<td>.25</td>
<td>2</td>
<td>20</td>
</tr>
</tbody>
</table>

✴ Hours per day and hours per pay should be based on the FTE.
ADD A JOB RECORD – HOURLY EMPLOYEE WITH END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✶ Use % as the wildcard for searches.
3. Enter the Query Date (the date the action on the EPAF is to become effective) in MM/DD/YYYY format.
4. Select Approval Category Hourly – Additional Job Record With End Date, ADDJHE.
5. Review current assignments under the Employee Job Assignments section.
   ✶ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✶ If the employee was previously in this position, STOP. Are you reactivating a primary job and there have
   been subsequent primary jobs since the original primary job was ended? If the answer is YES, continue with
   the Add a Job Record approval category; however, you must use a new suffix value for the position number.
   If the answer is NO, use the Reactivate a Job approval category rather than the Add a Job Record approval
   category.
   ✶ Review the Last Paid Date for each job assignments, and make a note of the most recent Last Paid Date
   for the employee.
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✶ The Suffix is a combination of 2 alpha and/or numeric characters. In most cases, the suffix used will be
   00. See Appendix D for Suffixes used to identify specific types of payments.
   ✶ If the employee has multiple current jobs in the same position (usually due to multiple rates of pay),
   start with a Suffix of 00, then use 01, 02, etc.
   ✶ If you are reactivating a primary job and there have been subsequent primary jobs since the original
   primary job was ended (see Step 5 above), use a one up on the Suffix originally used for the primary job you
   are reactivating (e.g., if the original Suffix used for the position was 00, use 01).
8. Select the radio button for the new job, and click on Go.
9. Review the Job Begin Date (defaulted to Query Date) and change if appropriate.
   ✶ The Job Begin Date is the date the assignment begins. For biweekly employees, enter the first day of the
   pay period for which the job record is to be effective.
   ✶ This date should be the same as the Jobs Effective Date.
10. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
    ✶ The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid
    Date for the employee. For biweekly employees, enter the first day of the pay period for which the job
    record is to be effective.
    ✶ The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and
    to the right of Transaction Status); however, this date appears only when updating an existing job. If the
    Last Paid Date information is not listed in this section, use the date you noted from the Employee Job
    Assignments section in step 5.
    ✶ For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.
11. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
    ✶ This date does not affect pay and serves as an information field for historical, audit, or reporting
    purposes.
12. Review the Contract Type (defaulted to Overload) and use the dropdown box to change if appropriate.
    ◇ Primary – The employee’s primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who
        teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car
        allowance, etc.).
    ✶ Each employee can have only one Primary job.
13. Review the **Job Change Reason** (defaulted to 1CURR, Concurrent Appointment) and use the dropdown box to change if appropriate.
   ✴ See the Job Change Reason Codes List in Appendix A for additional information.

14. Enter the new value as appropriate for:
   - Regular Rate – Employee’s Pay Rate per Hour.
   - FTE – Full-Time Equivalent. (** Must be 1.0 or less**)
   - Hours Per Day – Number of hours employee will work per day.
   - Hours Per Pay – Number of hours employee will work per pay period.
   - Timesheet Organization – Department timesheet organization number.

15. Review **Time Entry Method** and change if appropriate.
   - Remove – Do not select Remove as the Time Entry Method field must be populated.
   - Payroll Time Entry – Do not select Payroll Time Entry.
   - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.).
   - Department Time Entry with Approvals – Used by OSU-CHS only.
   - Third Party with Approvals – TimePro, AiM, Kronos, etc.

16. Enter the new value for:
   - Title

17. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
   ✴ The Effective Date is the date this action will affect payroll.

18. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
   - Chart (COA) MUST be X for the OSU System.
   - Funding total must equal 100.
   - The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.

19. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.
   - The Jobs Effective Date is the date this action will affect payroll. For biweekly employees, enter the last day of the pay period for which the terminate job record should be effective, and enter the actual last day of work as the Personnel Date.

20. Enter the **Personnel Date**.
   - This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.

21. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
   - See the Job Change Reason Codes List in Appendix A for additional information.

22. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   - A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

23. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

24. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

25. Review and then click on the Submit button.
   - The routing process does not begin until you click on the Save button and then the Submit button.
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name. ♦ Use % as the wildcard for searches.
3. Enter the Query Date (the date the action on the EPAF is to become effective) in MM/DD/YYYY format.
4. Select Approval Category Monthly with end date – Add Job Record, ADDJBS.
5. Review current assignments under the Employee Job Assignments section. ♦ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee. ♦ If the employee was previously in this position, STOP. Are you reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended? If the answer is YES, continue with the Add a Job Record approval category; however, you must use a new suffix value for the position number. If the answer is NO, use the Reactivate a Job approval category rather than the Add a Job Record approval category. ♦ Review the Last Paid Date for each job assignments, and make a note of the most recent Last Paid Date for the employee.
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job. ♦ The Suffix is a combination of 2 alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments. ♦ If the employee has multiple current jobs in the same position (usually due to multiple rates of pay), start with a Suffix of 00, then use 01, 02, etc. ♦ If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended (see Step 5 above), use a one up on the Suffix originally used for the primary job you are reactivating (e.g., if the original Suffix used for the position was 00, use 01).
8. Select the radio button for the new job, and click on Go.
9. Review the Job Begin Date (defaulted to Query Date) and change if appropriate. ♦ The Job Begin Date is the date the assignment begins. This date should be the same as the Jobs Effective Date.
10. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate. ♦ The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date. ♦ The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5. ♦ For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.
11. Review the Personnel Date (defaulted to Query Date) and change if appropriate. ♦ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
12. Review the Contract Type (defaulted to Overload) and use the dropdown box to change if appropriate. ◇ Primary – The employee’s primary job. ◇ Secondary – Used to add an additional position for an employee. ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.). ♦ Each employee can have only one Primary job.
13. Review the Job Status (defaulted to Active) and use the dropdown box to change if appropriate. ◇ Remove – Do not select Remove as the Job Status field must be populated. ◇ Active
Leave without Pay, with Benefits
Leave without Pay, without Benefits
Leave with Pay, with Benefits
Leave with Partial Pay, with Benefits – Used for 60% LTD.
Terminated – Do not select Terminated in the Additional Salaried Job section.

14. Select the **Job Change Reason** from the dropdown box.
   ✭ See the Job Change Reason Codes List in Appendix A for additional information.

15. Enter the new value as appropriate for:
   - **Annual Salary / Contract Amount** – Employee’s actual annual salary.
   - **Factor** – Used to calculate the amount per month to be paid.
     ✭ Annual Salary (or Contract Amount) / Factor = Monthly Payment
     ✭ As a general rule, the Factor will be the number of months in the contract / assignment for
       faculty members, 1 for graduate assistants, and 12 for exempt staff members.
   - **Pays** – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)
     ✭ Payroll Services will update the Pays field if a faculty member completes a deferral agreement.
     ✭ Unless the appointment is for less than 12 months, Factor = 12 and
       Pays = 12 regardless of when the employee is hired during the year.
   - **FTE** – Full-Time Equivalent. (✦ Must be 1.0 or less)
   - **Hours Per Day** – Number of hours employee will work per day.
   - **Hours Per Pay** – Number of hours employee will work per pay period.
     ✭ If the FTE for this employee is not 1.0, the Hours per Day and Hours
       per Pay (based on the FTE) MUST be entered.
   - **Timesheet Organization** – Department timesheet organization number.
   - **Title**

16. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
    ✭ The Effective Date is the date this action will affect payroll.

17. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
    ✭ Chart (COA) MUST be X for the OSU System.
    ✭ Funding total must equal 100%.
    ✭ The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to
      0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A
      remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter
      key or the Save button to remove the line.

18. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.
    ✭ The Jobs Effective Date is the date this action will affect payroll. Use the termination date – the last day
      the employee is scheduled to work in this position.

19. Enter the **Personnel Date**.
    ✭ This date does not affect pay and serves as an information field for historical, audit, or reporting
      purposes.

20. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to
    change if appropriate.
    ✭ See the Job Change Reason Codes List in Appendix A for additional information.

21. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
    ✭ A College / Division may have established specific routing instructions and/or requirements. Check with
      your College / Division before setting up a default Routing Queue to ensure compliance with those
      instructions and/or requirements.

22. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the
    job record.

23. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

24. Review and then click on the Submit button.
🌟 The routing process does not begin until you click on the Save button and then the Submit button.
ADD A JOB RECORD – MONTHLY EMPLOYEE WITH NO END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✴ Use % as the wildcard for searches.
3. Enter the Query Date (the date the action on the EPAF is to become effective).
4. Select Approval Category Monthly no end date – Add Job Record, ADJB52.
5. Review current assignments under the Employee Job Assignments section.
   ✴ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✴ If the employee was previously in this position, STOP. Are you reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended? If the answer is YES, continue with the Add a Job Record approval category; however, you must use a new suffix value for the position number. If the answer is NO, use the Reactivate a Job approval category rather than the Add a Job Record approval category.
   ✴ Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.
6. If you have determined you are using the correct approval category, click on Go.
7. Enter the Position number and Suffix for the new job.
   ✴ The Suffix is a combination of 2 alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.
   ✴ If the employee has multiple current jobs in the same position (usually due to multiple rates of pay), start with a Suffix of 00, then use 01, 02, etc.
   ✴ If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended (see Step 5 above), use a one up on the Suffix originally used for the primary job you are reactivating (e.g., if the original Suffix used for the position was 00, use 01).
8. Select the radio button for the new job, and click on Go.
9. Review the Job Begin Date (defaulted to Query Date) and change if appropriate.
   ✴ The Job Begin Date is the date the assignment begins. This date should be the same as the Jobs Effective Date.
10. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
    ✴ The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date.
    ✴ The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.
    ✴ For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.
11. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
    ✴ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
12. Use the dropdown box to select the Contract Type.
    ◊ Primary – The employee’s primary job.
    ◊ Secondary – Used to add an additional position for an employee.
    ◊ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✴ Each employee can have only one Primary job.
13. Select the Job Status (defaulted to Active) and use the dropdown box to change if appropriate.
    ◊ Remove – Do not select Remove as the Job Status field must be populated.
    ◊ Active
Leave without Pay, with Benefits
Leave without Pay, without Benefits
Leave with Pay, with Benefits
Leave with Partial Pay, with Benefits – Used for 60% LTD.
Terminated – Do not select Terminated for this approval category. Use a termination approval category.

14. Select the Job Change Reason from the dropdown box.
   ✴ See the Job Change Reason Codes List in Appendix A for additional information.

15. Enter the new value as appropriate for:
   - Annual Salary / Contract Amount – Employee’s actual annual salary.
   - Factor – Used to calculate the amount per month to be paid.
     ✴ Annual Salary (or Contract Amount) / Factor = Monthly Payment
     ✴ As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for exempt staff members.
   - Pays – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)
     ✴ Payroll Services will update the Pays field if a faculty member completes a deferral agreement.
     ✴ Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.
   - FTE – Full-Time Equivalent. (✴ Must be 1.0 or less)
   - Hours Per Day – Number of hours employee will work per day.
   - Hours Per Pay – Number of hours employee will work per pay period.
     ✴ If the FTE for this employee is not 1.0, the Hours per Day and Hours per Pay (based on the FTE) MUST be entered.
   - Timesheet Organization – Department timesheet organization number.
   - Title

16. Review the Effective Date (defaulted to Query Date) for the funding information and change if appropriate.
   ✴ The Effective Date is the date this action will affect payroll.

17. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
   ✴ Chart (COA) MUST be X for the OSU System.
   ✴ Funding total must equal 100%.
   ✴ The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.

18. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   ✴ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

19. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

20. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

21. Review and then click on the Submit button.
   ✴ The routing process does not begin until you click on the Save button and then the Submit button.
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.

2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✴ Use % as the wildcard for searches.

3. Enter the Query Date (the date the action on the EPAF is to become effective).

4. Select Approval Category Work Study – Add Job Record, ADJBWS.

5. Review current assignments under the Employee Job Assignments section.
   ✴ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✴ If the employee was previously in this position, STOP. Are you reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended? If the answer is YES, continue with the Add a Job Record approval category; however, you must use a new suffix value for the position number. If the answer is NO, use the Reactivate a Job approval category rather than the Add a Job Record approval category.
   ✴ Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.

6. If you have determined you are using the correct approval category, click on Go.

7. Enter the Position number and Suffix for the new job.
   ✴ The Suffix is a combination of 2 alpha and/or numeric characters. In most cases, the suffix used will be 00. See Appendix D for Suffixes used to identify specific types of payments.
   ✴ If the employee has multiple current jobs in the same position (usually due to multiple rates of pay), start with a Suffix of 00, then use 01, 02, etc.
   ✴ If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended (see Step 5 above), use a one up on the Suffix originally used for the primary job you are reactivating (e.g., if the original Suffix used for the position was 00, use 01).

8. Select the radio button for the new job, and click on Go.

9. Review the Job Begin Date (defaulted to Query Date) and change if appropriate.
   ✴ The Job Begin Date is the date the assignment begins. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   ✴ This date should be the same as the Jobs Effective Date.

10. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
     ✴ The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date for the employee. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
     ✴ The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.
     ✴ For a New Job record, the Jobs Effective Date MUST be the same as the Job Begin Date.

11. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
     ✴ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.

12. Review the Contract Type (defaulted to Secondary) and use the dropdown box to change if appropriate.
     ◊ Primary – The employee’s primary job.
     ◊ Secondary – Used to add an additional position for an employee.
     ◊ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
     ✴ Each employee can have only one Primary job.

13. Select the Job Change Reason from the dropdown box.
14. Enter the new value as appropriate for:
   - **Regular Rate** – Employee’s Pay Rate per Hour.
   - **FTE** – Full-Time Equivalent. (Must be 1.0 or less)
   - **Hours Per Day** – Number of hours employee will work per day.
   - **Hours Per Pay** – Number of hours employee will work per pay period.
   - **Timesheet Organization** – Department timesheet organization number.

15. Review **Time Entry Method** and change if appropriate.
   - **Remove** – Do not select Remove as the Time Entry Method field must be populated.
   - **Payroll Time Entry** – Do not select Payroll Time Entry.
   - **Employee Time Entry via Web** – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.).
   - **Department Time Entry with Approvals** – Used by OSU-CHS only.
   - **Third Party with Approvals** – TimePro, AiM, Kronos, etc.

16. Enter the new value for:
   - **Title**

17. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
   - The Effective Date is the date this action will affect payroll.

18. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
   - **Chart (COA)** MUST be X for the OSU System.
   - Funding total must equal 100%.
   - The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.

19. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   - A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

20. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

21. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

22. Review and then click on the Submit button.
   - The routing process does not begin until you click on the Save button and then the Submit button.
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✴ Use % as the wildcard for searches.
3. Enter the Query Date (the date the action on the EPAF is to become effective) in MM/DD/YYYY format.
4. Select Approval Category Hourly – Change Job Record, CHGJBH.
5. Review current assignments under the Employee Job Assignments section.
   ✴ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✴ Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.
6. Click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
   ✴ The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   ✴ The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status). If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.
9. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
   ✴ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
10. Review the Contract Type current value and use the dropdown box to change if appropriate.
    ◦ Primary – The employee’s primary job.
    ◦ Secondary – Used to add an additional position for an employee.
    ◦ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
   ✴ Each employee can have only one Primary job.
11. Review Job Status current value and use the dropdown box to change if appropriate.
    ◦ Remove – Do not select Remove as the Job Status field must be populated.
    ◦ Active
    ◦ Leave without Pay, with Benefits
    ◦ Leave without Pay, without Benefits
    ◦ Leave with Pay, with Benefits
    ◦ Leave with Partial Pay, with Benefits
    ◦ Terminated – Do not select Terminated for this approval category. Use a termination approval category.
12. Select the Job Change Reason from the dropdown box.
    ✴ See the Job Change Reason Codes List in Appendix A for additional information.
13. Review the current values and enter the new value for any changes to:
    ◦ Regular Rate – Employee’s Pay Rate per Hour.
    ◦ FTE – Full-Time Equivalent. (✴ Must be 1.0 or less)
    ◦ Hours Per Day – Number of hours employee will work per day.
    ◦ Hours Per Pay – Number of hours employee will work per pay period. ✴ If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.
    ◦ Timesheet Organization – Department timesheet organization number.
14. Review **Time Entry Method** and change if appropriate. This field will most likely not need to be changed for an existing job.
   - Remove – Do **not** select Remove as the Time Entry Method field must be populated.
   - Payroll Time Entry – Do **not** select Payroll Time Entry.
   - Employee Time Entry via Web – Banner time entry method.
   - Department Time Entry with Approvals – Used by OSU-CHS only.
   - Third Party with Approvals – TimePro, AiM, Kronos, etc.

15. Review the current value and enter the new value for any change to:
   - **Title**

16. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
   - The Effective Date is the date this action will affect payroll.

17. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.
   - Chart (COA) **MUST** be X for the OSU System.
   - Funding total must equal 100%.
   - The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.

18. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   - A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

19. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

20. Click on the **Save** button, and check the top of the EPAF to make sure the action was saved successfully.

21. Review and then click on the **Submit** button.
   - The routing process does not begin until you click on the **Save** button and then the **Submit** button.
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name. Use % as the wildcard for searches.
3. Enter the Query Date (the date the action on the EPAF is to become effective) in MM/DD/YYYY format.
4. Select Approval Category Monthly – Change Job Record, CHJBS.
5. Review current assignments under the Employee Job Assignments section.
   ✴ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✴ Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.
6. Click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
   ✴ The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date.
   ✴ The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status). If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.
9. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
   ✴ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
10. Review the Contract Type current value and use the dropdown box to change if appropriate.
    ✴ Primary – The employee’s primary job.
    ✴ Secondary – Used to add an additional position for an employee.
    ✴ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
    ✴ Each employee can have only one Primary job.
11. Review Job Status current value and use the dropdown box to change if appropriate.
    ✴ Remove – Do not select Remove as the Job Status field must be populated.
    ✴ Active
    ✴ Leave without Pay, with Benefits
    ✴ Leave without Pay, without Benefits
    ✴ Leave with Pay, with Benefits
    ✴ Leave with Partial Pay, with Benefits – Used for 60% LTD.
    ✴ Terminated – Do not select Terminated for this approval category. Use a termination approval category.
12. Select the Job Change Reason from the dropdown box.
    ✴ See the Job Change Reason Codes List in Appendix A for additional information.
13. Review the current values and enter the new value for any changes to:
    ✴ Annual Salary / Contract Amount – Employee’s actual annual salary.
    ✴ Factor – Used to calculate the amount per month to be paid.
      ✴ Annual Salary (or Contract Amount) / Factor = Monthly Payment
      ✴ As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for exempt staff members.
    ✴ Pays – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)
      ✴ Payroll Services will update the Pays field if a faculty member completes a deferral agreement.
      ✴ Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.
    ✴ FTE – Full-Time Equivalent. (∗ Must be 1.0 or less)
14. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
   - **The Effective Date is the date this action will affect payroll.**

15. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.
   - **Chart (COA) MUST be X for the OSU System.**
   - **Funding total must equal 100%.**
   - **The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.**

16. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   - **A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.**

17. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

18. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

19. Review and then click on the Submit button.
   - **The routing process does not begin until you click on the Save button and then the Submit button.**

### Hours Per Day
- **Hours Per Day** – Number of hours employee will work per day.
- **Hours Per Pay** – Number of hours employee will work per pay period.

- If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.

### Timesheet Organization
- Department timesheet organization number.

### Title

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- Hours per day and hours per pay should be based on the FTE.
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✴ Use % as the wildcard for searches.
3. Enter the Query Date (the date the action on the EPAF is to become effective) in MM/DD/YYYY format.
4. Select Approval Category Work Study – Change Job Record, CHJBWS.
5. Review current assignments under the Employee Job Assignments section.
   ✴ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✴ Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.
6. Click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
   ✴ The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   ✴ The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status). If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.
9. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
   ✴ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
10. Review the Contract Type current value and use the dropdown box to change if appropriate.
   ◊ Primary – The employee’s primary job.
   ◊ Secondary – Used to add an additional position for an employee.
   ◊ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
11. Review Job Status current value and use the dropdown box to change if appropriate.
   ◊ Remove – Do not select Remove as the Job Status field must be populated.
   ◊ Active
   ◊ Leave without Pay, with Benefits
   ◊ Leave without Pay, without Benefits
   ◊ Leave with Pay, with Benefits
   ◊ Leave with Partial Pay, with Benefits
   ◊ Terminated – Do not select Terminated for this approval category. Use a termination approval category.
   ✴ Each employee can have only one Primary job.
12. Select the Job Change Reason from the dropdown box.
   ✴ See the Job Change Reason Codes List in Appendix A for additional information.
13. Review the current values and enter the new value for any changes to:
   ◊ Regular Rate – Employee’s Pay Rate per Hour.
   ◊ FTE – Full-Time Equivalent. (✴ Must be 1.0 or less)
   ◊ Hours Per Day – Number of hours employee will work per day.
   ◊ Hours Per Pay – Number of hours employee will work per pay period.
     ✴ If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.
   ◊ Timesheet Organization – Department timesheet organization number.
14. Review **Time Entry Method** and change if appropriate. This field will most likely not need to be changed for an existing job.
   - Remove – Do not select Remove as the Time Entry Method field must be populated.
   - Payroll Time Entry – Do not select Payroll Time Entry.
   - Employee Time Entry via Web – Banner time entry method.
   - Department Time Entry with Approvals – Used by OSU-CHS only.
   - Third Party with Approvals – TimePro, AiM, Kronos, etc.
15. Review the current value and enter the new value for any change to:
   - **Title**
16. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
   - The Effective Date is the date this action will affect payroll.
17. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.
   - Chart (COA) MUST be X for the OSU System.
   - Funding total must equal 100%.
   - The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.
18. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   - A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
19. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
20. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
21. Review and then click on the Submit button.
   - The routing process does not begin until you click on the Save button and then the Submit button.
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✴ Use % as the wildcard for searches.
3. Enter the Query Date in MM/DD/YYYY format.
   ✴ When reactivating a previous job, you may query using an earlier date when that previous job was active. This will allow you to select the previous job. Remember to change the Jobs Effective Date, Personnel Date, and Funding Effective Date as appropriate as the query date will have auto-populated those fields.
4. Select Approval Category Hourly – Reactivate Job Record, REJBH.
5. Review current assignments under the Employee Job Assignments section.
   ✴ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✴ If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended, STOP. Use an Add a New Job approval category and use a new suffix value for the position number.
   ✴ Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.
6. If you have determined you are using the correct approval category, click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
   ✴ The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date for the employee. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   ✴ The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.
9. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
   ✴ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
10. Review the Contract Type current value and use the dropdown box to change if appropriate.
    ◇ Primary – The employee’s primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
   ✴ Each employee can have only one Primary job.
11. Select the Job Change Reason from the dropdown box.
    ✴ See the Job Change Reason Codes List in Appendix A for additional information.
12. Review the current values and enter the new value for any changes to:
    ◇ Regular Rate – Employee’s Pay Rate per Hour.
    ◇ FTE – Full-Time Equivalent. (* Must be 1.0 or less)
    ◇ Hours Per Day – Number of hours employee will work per day.
    ◇ Hours Per Pay – Number of hours employee will work per pay period.
      ✴ If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.
    ◇ Timesheet Organization – Department timesheet organization number.
    ◇ Title

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</tbody>
</table>

✴ Hours per day and hours per pay should be based on the FTE.
13. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
   ✴ The Effective Date is the date this action will affect payroll.

14. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.
   ✴ Chart (COA) **MUST** be X for the OSU System.
   ✴ Funding total must equal 100%.
   ✴ The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.

15. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   ✴ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

16. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

17. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

18. Review and then click on the Submit button.
   ✴ The routing process does not begin until you click on the Save button and then the Submit button.
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✴ Use % as the wildcard for searches.
3. Enter the Query Date in MM/DD/YYYY format.
   ✴ When reactivating a previous job, you may query using an earlier date when that previous job was active. This will allow you to select the previous job. Remember to change the Jobs Effective Date, Personnel Date, and Funding Effective Date as appropriate as the query date will have auto-populated those fields.
4. Select Approval Category Hourly – Reactivate Job Record With End Date, REJBH2.
5. Review current assignments under the Employee Job Assignments section.
   ✴ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✴ If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended, STOP. Use an Add a New Job approval category and use a new suffix value for the position number.
   ✴ Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.
6. If you have determined you are using the correct approval category, click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
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    ◇ Primary – The employee’s primary job.
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   ✴ Each employee can have only one Primary job.
11. Select the Job Change Reason from the dropdown box.
   ✴ See the Job Change Reason Codes List in Appendix A for additional information.
12. Review the current values and enter the new value for any changes to:
    ◇ Regular Rate – Employee’s Pay Rate per Hour.
    ◇ FTE – Full-Time Equivalent. (✴ Must be 1.0 or less)
    ◇ Hours Per Day – Number of hours employee will work per day.
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      ✴ If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.
    ◇ Timesheet Organization – Department timesheet organization number.
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</tr>
</tbody>
</table>
✴ Hours per day and hours per pay should be based on the FTE.
13. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
   - The Effective Date is the date this action will affect payroll.

14. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.
   - Chart (COA) **MUST** be X for the OSU System.
   - Funding total must equal 100%.
   - The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.

15. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.
   - The Jobs Effective Date is the date this action will affect payroll. For biweekly employees, enter the last day of the pay period for which the terminate job record should be effective, and enter the actual last day of work as the Personnel Date.

16. Enter the **Personnel Date**.
   - This date does **not** affect pay and serves as an information field for historical, audit, or reporting purposes.

17. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
   - See the Job Change Reason Codes List in Appendix A for additional information.

18. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   - A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

19. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

20. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

21. Review and then click on the Submit button.
   - The routing process does not begin until you click on the Save button and then the Submit button.
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.

2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✴ Use % as the wildcard for searches.

3. Enter the Query Date in MM/DD/YYYY format.
   ✴ When reactivating a previous job, you may query using an earlier date when that previous job was active. This will allow you to select the previous job. Remember to change the Jobs Effective Date, Personnel Date, and Funding Effective Date as appropriate as the query date will have auto-populated those fields.

4. Select Approval Category Monthly with end date – Reactivate Job Record, REJBS.

5. Review current assignments under the Employee Job Assignments section.
   ✴ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✴ If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended, STOP. Use an Add a New Job approval category and use a new suffix value for the position number.
   ✴ Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.

6. If you have determined you are using the correct approval category, click on Go.

7. Select the radio button for the position to be changed, and click on Go.

8. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
   ✴ The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date.
   ✴ The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.

9. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
   ✴ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.

10. Review the Contract Type current value and use the dropdown box to change if appropriate.
    ◊ Primary – The employee’s primary job.
    ◊ Secondary – Used to add an additional position for an employee.
    ◊ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.)
    ✴ Each employee can have only one Primary job.

11. Review Job Status (defaulted to Active) and use the dropdown box to change if appropriate.
    ◊ Remove – Do not select Remove as the Job Status field must be populated.
    ◊ Active
    ◊ Leave without Pay, with Benefits
    ◊ Leave without Pay, without Benefits
    ◊ Leave with Pay, with Benefits
    ◊ Leave with Partial Pay, with Benefits – Used for 60% LTD.
    ◊ Terminated – Do not select Terminated in this section.

12. Select the Job Change Reason from the dropdown box.
    ✴ See the Job Change Reason Codes List in Appendix A for additional information.

13. Review the current values and enter the new value for any changes to:
    ◊ Annual Salary / Contract Amount – Employee’s actual annual salary.
    ◊ Factor – Used to calculate the amount per month to be paid.
**Annual Salary (or Contract Amount) / Factor = Monthly Payment**

**As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for exempt staff members.**

- **Pays – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)**
- **Payroll Services will update the Pays field if a faculty member completes a deferral agreement.**
- **Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.**

- **FTE – Full-Time Equivalent. (Must be 1.0 or less)**
- **Hours Per Day – Number of hours employee will work per day.**
- **Hours Per Pay – Number of hours employee will work per pay period.**
  - If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.

- **Timesheet Organization – Department timesheet organization number.**

14. **Review the Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
  - The Effective Date is the date this action will affect payroll.

15. **Review current funding and update funding in the New section** (defaulted to the current value) if appropriate.
  - Chart (COA) **MUST** be X for the OSU System.
  - Funding total must equal 100%.
  - The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.

16. **In the Terminate Job Record Only section,** enter the **Jobs Effective Date.**
  - The Jobs Effective Date is the date this action will affect payroll. Use the termination date – the last day the employee is scheduled to work in this position.

17. **Enter the Personnel Date.**
  - This date does **not** affect pay and serves as an information field for historical, audit, or reporting purposes.

18. **Review the Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
  - **See the Job Change Reason Codes List in Appendix A for additional information.**

19. **Review the Routing Queue and use the magnifying glass to change or add User Name(s)** if appropriate.
  - A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

20. **In the Comment box,** enter comments with sufficient detail for the approvers to understand the change to the job record.

21. **Click on the Save button,** and check the top of the EPAF to make sure the action was saved successfully.

22. **Review and then click on the Submit button.**
  - The routing process does not begin until you click on the Save button and then the Submit button.
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✴ Use the % as the wildcard for searches.
3. Enter the Query Date in MM/DD/YYYY format.
   ✴ When reactivating a previous job, you may query using an earlier date when that previous job was active. This will allow you to select the previous job. Remember to change the Jobs Effective Date, Personnel Date, and Funding Effective Date as appropriate as the query date will have auto-populated those fields.
4. Select Approval Category Monthly no end date – Reactive Job Record, REJBS2.
5. Review current assignments under the Employee Job Assignments section.
   ✴ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✴ If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended, STOP. Use an Add a New Job approval category and use a new suffix value for the position number.
   ✴ Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.
6. If you have determined you are using the correct approval category, click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
   ✴ The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date.
   ✴ The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.
9. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
   ✴ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
10. Review the Contract Type current value and use the dropdown box to change if appropriate.
    ◇ Primary – The employee’s primary job.
    ◇ Secondary – Used to add an additional position for an employee.
    ◇ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.)
    ✴ Each employee can have only one Primary job.
11. Review Job Status (defaulted to Active) and use the dropdown box to change if appropriate.
    ◇ Remove – Do not select Remove as the Job Status field must be populated.
    ◇ Active
    ◇ Leave without Pay, with Benefits
    ◇ Leave without Pay, without Benefits
    ◇ Leave with Pay, with Benefits
    ◇ Leave with Partial Pay, with Benefits – Used for 60% LTD.
    ◇ Terminated – Do not select Terminated for this approval category. Use a termination approval category.
12. Select the Job Change Reason from the dropdown box.
    ✴ See the Job Change Reason Codes List in Appendix A for additional information.
13. Review the current values and enter the new value for any changes to:
    ◇ Annual Salary / Contract Amount – Employee’s actual annual salary.
- **Factor** – Used to calculate the amount per month to be paid.
  - Annual Salary (or Contract Amount) / Factor = Monthly Payment
  - As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for exempt staff members.

- **Pays** – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)
  - Payroll Services will update the Pays field if a faculty member completes a deferral agreement.
  - Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.

- **FTE** – Full-Time Equivalent.  (**Must be 1.0 or less**)

- **Hours Per Day** – Number of hours employee will work per day.

- **Hours Per Pay** – Number of hours employee will work per pay period.
  - If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.

- **Timesheet Organization** – Department timesheet organization number.

14. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
   - The Effective Date is the date this action will affect payroll.

15. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.
   - Chart (COA) **MUST** be X for the OSU System.
   - Funding total must equal 100%.
   - The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.

16. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   - A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

17. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

18. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

19. Review and then click on the Submit button.
   - The routing process does not begin until you click on the Save button and then the Submit button.
REACTIVATE A JOB RECORD – WORK STUDY

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✤ Use % as the wildcard for searches.
3. Enter the Query Date in MM/DD/YYYY format.
   ✤ Whenreactivating a previous job, you may query using an earlier date when that previous job was active. This will allow you to select the previous job. Remember to change the Jobs Effective Date, Personnel Date, and Funding Effective Date as appropriate as the query date will have auto-populated those fields.
4. Select Approval Category Reactivate Job Record Work Study, REJWS.
5. Review current assignments under the Employee Job Assignments section.
   ✤ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✤ If you are reactivating a primary job and there have been subsequent primary jobs since the original primary job was ended, STOP. Use an Add a New Job approval category and use a new suffix value for the position number.
   ✤ Review the Last Paid Date for all job assignments, and make a note of the most recent Last Paid Date for the employee.
6. If you have determined you are using the correct approval category, click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
   ✤ The Jobs Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date for the employee. For biweekly employees, enter the first day of the pay period for which the job record is to be effective.
   ✤ The Last Paid Date for the employee is listed in the top section of the EPAF screen (under Query Date and to the right of Transaction Status); however, this date appears only when updating an existing job. If the Last Paid Date information is not listed in this section, use the date you noted from the Employee Job Assignments section in step 5.
9. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
   ✤ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
10. Review the Contract Type current value and use the dropdown box to change if appropriate.
   ➤ Primary – The employee’s primary job.
   ➤ Secondary – Used to add an additional position for an employee.
   ➤ Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).
   ✤ Each employee can have only one Primary job.
11. Select the Job Change Reason from the dropdown box.
   ✤ See the Job Change Reason Codes List in Appendix A for additional information.
12. Review the current values and enter the new value for any changes to:
   ➤ Regular Rate – Employee’s Pay Rate per Hour.
   ➤ FTE – Full-Time Equivalent. ( ✤ Must be 1.0 or less)
   ➤ Hours Per Day – Number of hours employee will work per day.
   ➤ Hours Per Pay – Number of hours employee will work per pay period.
   ✤ If a change is made to FTE, Hours Per Day and Hours Per Pay must be updated.
   ➤ Timesheet Organization – Department timesheet organization number.
   ➤ Title

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<tr>
<td>.25</td>
<td>2</td>
<td>20</td>
</tr>
</tbody>
</table>

➤ Hours per day and hours per pay should be based on the FTE.
13. Review the **Effective Date** (defaulted to Query Date) for the New funding information and change if appropriate.
   ✴ The Effective Date is the date this action will affect payroll.

14. Review current funding and update funding in the New section (defaulted to the current value) if appropriate.
   ✴ Chart (COA) **MUST** be X for the OSU System.
   ✴ Funding total must equal 100%.
   ✴ The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.

15. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   ✴ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

16. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

17. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

18. Review and then click on the Submit button.
   ✴ The routing process does not begin until you click on the Save button and then the Submit button.
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✴ Use % as the wildcard for searches.
3. Enter the Query Date (the date the action on the EPAF is to become effective).
4. Select Approval Category Update Labor Distribution Record, GLABR.
5. Review current assignments under the Employee Job Assignments section.
   ✴ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
6. Click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the Effective Date (defaulted to Query Date) for the New funding information and change if appropriate.
   ✴ The Effective Date is the date this action will affect payroll, and this date must be after the Last Paid Date. (The Last Paid Date is listed in the Update Labor Distribution Information heading for this section.)
9. Review current funding and update funding in the New section (defaulted to the current value).
   ✴ Chart (COA) MUST be X for the OSU System.
   ✴ Funding total must equal 100%.
   ✴ The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.
10. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
    ✴ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
11. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
12. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
13. Review and then click on the Submit button.
   ✴ The routing process does not begin until you click on the Save button and then the Submit button.
TERMINATE A JOB RECORD

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✴ Use % as the wildcard for searches.
3. Enter the Query Date (the date the action on the EPAF is to become effective).
4. Select Approval Category Terminate – Job Record Only, TERMJB.
   ✴ When preparing an EPAF for an employee who is retiring, select this approval category – do NOT select Terminate a Job Record and Employee.
5. Review current assignments under the Employee Job Assignments section.
   ✴ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
6. Click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
   ✴ The Jobs Effective Date is the date this action will affect payroll. This should be the actual last day of work for monthly employees and can be the Last Paid Date or later. (The Last Paid Date is listed in the top section of the EPAF screen – under Query Date and to the right of Transaction Status.) For biweekly employees, enter the last day of the pay period for which the terminate job record should be effective, and enter the actual last day of work as the Personnel Date.
   ✴ If the employee’s last day of work is prior to the Last Paid Date, use the Last Paid Date as the Jobs Effective Date, and enter the actual last day of work as the Personnel Date.
9. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
   ✴ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
10. Select the Job Change Reason from the dropdown box.
    ✴ See the Job Change Reason Codes List in Appendix A for additional information.
11. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
    ✴ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.
12. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
13. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
14. Review and then click on the Submit button.
    ✴ The routing process does not begin until you click on the Save button and then the Submit button.
TERMINATE A JOB RECORD AND EMPLOYEE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✴ Use % as the wildcard for searches.
3. Enter the Query Date (the date the action on the EPAF is to become effective).
4. Select Approval Category Terminate – Job Record and Employee, TERME.
   ✴ Do NOT select this approval category for an employee who is retiring – use Terminate Job Record Only, TERMJB.
5. Review current assignments under the Employee Job Assignments section.
   ✴ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✴ If an employee has at least one other active assignment in addition to his/her Primary job, STOP. Use the Terminate a Job Record approval category to terminate all job records other than the Primary job record. Then use the Terminate a Job Record and Employee approval category to terminate the Primary job record and the employee.
6. Click on Go.
7. Select the radio button for the position to be changed, and click on Go.
8. In the Terminate/End Pay Job Record Only, review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
   ✴ The Jobs Effective Date is the date this action will affect payroll. This should be the actual last day of work for monthly employees and can be the Last Paid Date or later. (The Last Paid Date is listed in the top section of the EPAF screen – under Query Date and to the right of Transaction Status.) For biweekly employees, enter the last day of the pay period for which the terminate job record should be effective, and enter the actual last day of work as the Personnel Date.
   ✴ If the employee’s last day of work is prior to the last Paid Date, use the Last Paid Date as the Jobs Effective Date, and enter the actual last day of work as the Personnel Date.
9. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
   ✴ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
10. Select the Job Change Reason from the dropdown box.
    ✴ See the Job Change Reason Codes List in Appendix A for additional information.
11. In the Terminate Employee section, select the Term Reason Code from the dropdown box.
12. Review the Termination Date (defaulted to Query Date) and change if appropriate.
    ✴ The Termination Date is normally the Last Work Date.
    ✴ The Termination Date cannot be earlier than the Jobs Effective Date entered in the Terminate/End Pay Job Record section. If the last day of the pay period or the Last Paid Date is used for the Jobs Effective Date, enter that same date for the Termination Date.
13. Review the Last Work Date (defaulted to Query Date) and change if appropriate.
    ✴ The Last Work Date is the last day the employee is expected to work and will normally be the same as the Termination Date.
    ✴ For biweekly employees, the last day of the pay period for which the terminate job record should be effective is used as the Jobs Effective Date in the Terminate/End Pay Job Record section. Therefore, the Last Work Date may be a date prior to the Jobs Effective Date entered in the Terminate/End Pay Job Record section.
    ✴ If there are questions regarding the Last Work Date due to the use of paid leave, please contact your HR Partner for assistance.
14. Review the Employee Status (defaulted to T, Terminated) and change if appropriate.
    ✴ If the Termination Date is a future date, change the Employee Status to Active. When the payroll is processed for the period that includes the Termination Date, the employee status will automatically be set to Terminated.
15. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   ✴ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

16. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

17. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

18. Review and then click on the Submit button.
   ✴ The routing process does not begin until you click on the Save button and then the Submit button.
EXCEPTION TO NORMAL PAY – CREATE A NEW JOB

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.

2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✪ Use % as the wildcard for searches.

3. Enter the Query Date (the date the action on the EPAF is to become effective).
   ✪ Review the Monthly Payroll Processing Schedule found at [https://payroll.okstate.edu/schedules-deadlines](https://payroll.okstate.edu/schedules-deadlines), determine which pay period the ENP will be paid (regular monthly or supplemental), and enter the first day of the month of the payroll on which the ENP will be paid. (For example, if the ENP will be paid on the August regular monthly payroll or August supplemental payroll, you MUST enter 08/01/YYYY.)
   ✪ The regular monthly payroll will pay on the last day of the month and the supplemental payroll will pay on the 12th of the following month, unless the 12th is a non-working day. (For example, the August monthly payroll will pay on 08/31/YYYY, and the August supplemental payroll will pay on 09/12/YYYY. For both the August monthly payroll and August supplemental payroll, you MUST enter 08/01/YYYY.)

4. Select Exception to Normal Pay Create New Job, ENPNEW.
   ✪ This approval category can only be used for a monthly employee.
   ✪ If the ENP is related to retroactive pay for a monthly non-exempt employee, do NOT use an ENP EPAF.
   Complete the ENP form found at [https://payroll.okstate.edu/guides-forms](https://payroll.okstate.edu/guides-forms) and attach the appropriate documentation so time, leave, and any overtime/comp time adjustments are properly addressed.

5. Review current assignments under the Employee Job Assignments section.
   ✪ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.

6. Click on Go.

7. Enter the Position and Suffix for the ENP.
   ✪ Use the Position the ENP applies to and enter a new Suffix beginning with the letter “Z” followed by a number. (Start with Z0 and go up to Z9 if needed.)
   ✪ If the ENP applies to a Position for which the job record has previously been terminated and that Position has not been canceled, do NOT reactivate the job record. The ENP EPAF can be processed using that position number and the new Suffix beginning with the letter “Z” followed by a number.

8. Select the radio button for the New Job, and click on Go.

9. Review the Job Begin Date (defaulted to Query Date).
   ✪ The Job Begin Date MUST be the first day of the month of the payroll on which the ENP will be processed.
This date should be the same as the Jobs Effective Date.

10. Review the Jobs Effective Date (defaulted to Query Date).
    ✴ The Jobs Effective Date MUST be the first day of the month of the payroll on which the ENP will be processed.
    ✴ The Jobs Effective Date MUST be the same as the Job Begin Date.

11. Review the Personnel Date (defaulted to Query Date).
    ✴ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.

12. Select the Job Change Reason from the dropdown box.
    ✴ Job Change Reason codes to be used for this approval category begin with ENP.
    ✴ Select one of the Job Change Reason Codes from the list below. (This chart is also found in Appendix B.)

<table>
<thead>
<tr>
<th>Job Change Reason</th>
<th>Earnings Code</th>
<th>Use / Additional Information &amp; Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENPSP</td>
<td>Special Projects</td>
<td>130 Extra Time Pay Extra work; grading papers; special short-term projects</td>
</tr>
<tr>
<td>ENPRP</td>
<td>Retroactive Pay</td>
<td>A10 Regular Monthly Adj EPAF was late and employee was not paid; adjustment to a payment received in a prior month</td>
</tr>
<tr>
<td>ENPIN</td>
<td>Incentive Pay</td>
<td>081 Approved Incentive Plans Certificate Programs (e.g., Ambassador Program, Leadership Program)</td>
</tr>
<tr>
<td>ENPAW</td>
<td>Awards</td>
<td>080 Awards Award for Excellence; Outstanding Staff Award; published paper</td>
</tr>
<tr>
<td>ENPMV</td>
<td>Moving Allowance</td>
<td>515 Moving Allowance Salary additive for moving expenses for new faculty/staff</td>
</tr>
<tr>
<td>ENPPP</td>
<td>Practice Plan</td>
<td>131 Professional Payment Plan Used by OSU-CHS – Practice Plan payments</td>
</tr>
</tbody>
</table>

13. Review the Payroll ID (defaulted to JM, OSU Monthly) and use the dropdown box to change if appropriate.
    ✴ Select “JM, OSU Monthly” for the regular monthly payroll or “JX, OSU Supplemental” for the supplemental payroll. (Only select JM or JX – do NOT select any of the other Payroll IDs listed.)

14. Complete the Exception to Normal Pay Payment Information section:
    ○ Effective Date (defaulted to Query Date) – The date this action will affect payroll.
      ✴ The Effective Date MUST be the first day of the month of the payroll on which the ENP will be processed. This date MUST be the same date as the Job Begin Date and Jobs Effective Date above.
    ○ Earnings Code – Select the appropriate Earnings Code from the dropdown box.
      ✴ Only certain Earnings Codes can be used for this approval category. Others will result in an error message.
      ✴ See the ENP Job Change Reason Codes and Earnings Codes Chart in Step 12 above and select the Earnings Code that corresponds with the Job Change Reason selected.
    ○ Hours or Units Per Pay
      ✴ Enter the number “1”.
    ○ Deemed Hours – Leave this field blank.
    ○ Special Rate – The total amount the employee is to be paid.
    ○ Shift – Defaulted to 1. Do not change this field.
    ○ End Date
      ✴ The End Date MUST be the first day of the following month. (For example, if the ENP will be paid on the August regular monthly payroll or August supplemental payroll, you MUST enter 09/01/YYYY.)

15. Review the Effective Date (defaulted to Query Date) for the funding information.
    ✴ The Effective Date is the date this action will affect payroll.

16. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
    ✴ Chart (COA) MUST be X for the OSU System.
    ✴ Funding total must equal 100%.
The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.

17. In the Terminate / End Pay Job Record Only section, enter the Jobs Effective Date.
- The Jobs Effective Date is the date this action will affect payroll. This date MUST be the last day of the month of the payroll on which the ENP will be processed. (For example, if the Job Begin Date is 08/01/YYYY, this date MUST be 08/31/YYYY.)

18. Enter the Personnel Date.
- This date does not affect pay and serves as an information field for historical, audit, or reporting purposes. Use the same date as the Jobs Effective Date.

19. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
- A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

20. In the Comment box, enter comments with sufficient detail for the approvers to understand the ENP being processed.

21. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

22. Review and then click on the Submit button.
- The routing process does not begin until you click on the Save button and then the Submit button.
**EXCEPTION TO NORMAL PAY – REACTIVATE AN EXISTING ENP JOB**

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > New EPAF.
2. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.  
   ✭ Use % as the wildcard for searches.
3. Enter the **Query Date** (the date the action on the EPAF is to become effective).  
   ✭ Review the Monthly Payroll Processing Schedule found at https://payroll.okstate.edu/schedules-deadlines, determine which pay period the ENP will be paid (regular monthly or supplemental), and enter the first day of the month of the payroll on which the ENP will be paid.  (For example, if the ENP will be paid on the August regular monthly payroll or August supplemental payroll, you MUST enter 08/01/YYYY.)  
   ✭ The regular monthly payroll will pay on the last day of the month and the supplemental payroll will pay on the 12\(^{th}\) of the following month, unless the 12\(^{th}\) is a non-working day.  (For example, the August monthly payroll will pay on 08/31/YYYY, and the August supplemental payroll will pay on 09/12/YYYY.  For both the August monthly payroll and August supplemental payroll, you MUST enter 08/01/YYYY.)

<table>
<thead>
<tr>
<th></th>
<th>Pay Period</th>
<th>Leave Reports</th>
<th>Leave Approvals</th>
<th>EPAFs Due by</th>
<th>Paper Ready to Pay</th>
<th>ENP's Due in Payroll</th>
<th>Final Payroll Payday</th>
<th>Regular Payday Payday</th>
<th>Suppl Payday Payday</th>
</tr>
</thead>
<tbody>
<tr>
<td>June Supp</td>
<td>6/29/2017</td>
<td>7/5/2017</td>
<td>7/12/2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>July</td>
<td>7/17/2017</td>
<td>7/17/2017</td>
<td>7/14/2017</td>
<td>7/17/2017</td>
<td>7/21/2017</td>
<td>7/31/2017</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

See Appendix C for more information on dates to be used for this approval category.

✭ If the ENP is being used to process an overpayment (or a negative amount), the ENP cannot be processed on a supplemental payroll.  The ENP must be processed on the next regular monthly payroll.

4. Select **Reactivate an Existing Exception to Normal Pay Job, ENPRJB**.  
   ✭ This approval category can only be used for a monthly employee.
   ✭ If the ENP is related to retroactive pay for a monthly non-exempt employee, do NOT use an ENP EPAF.  
   Complete the ENP form found at https://payroll.okstate.edu/guides-forms and attach the appropriate documentation so time, leave, and any overtime/comp time adjustments are properly addressed.

5. Review current assignments under the Employee Job Assignments section.  
   ✭ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.  
   ✭ If the employee does not have an assignment with the Position for which the ENP applies with a Suffix beginning with the letter “Z” followed by a number, STOP.  You may have selected the wrong approval category.

6. If you have determined you are using the correct approval category, click on Go.
7. Select the radio button for the existing ENP job to be reactivated, and click on Go.  
   ✭ An ENP that can be reactivated will have a Suffix that begins with the letter “Z” followed by a number.
8. Review the **Jobs Effective Date** (defaulted to Query Date).  
   ✭ The Jobs Effective Date **MUST** be the first day of the month of the payroll on which the ENP will be processed.
9. Review the **Personnel Date** (defaulted to Query Date).
This date does **not** affect pay and serves as an information field for historical, audit, or reporting purposes.

10. Select the **Job Change Reason** from the dropdown box.

   - Job Change Reason codes to be used for this approval category begin with ENP.
   - Select one of the Job Change Reason Codes from the list below. (This chart is also found in Appendix B.)

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<tr>
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<th>Earnings Code</th>
<th>Use / Additional Information &amp; Notes</th>
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<td>ENPRP Retroactive Pay</td>
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<tr>
<td>ENPIN Incentive Pay</td>
<td>081 Approved Incentive Plans</td>
<td>Certificate Programs (e.g., Ambassador Program, Leadership Program)</td>
</tr>
<tr>
<td>ENPAW Awards</td>
<td>080 Awards</td>
<td>Award for Excellence; Outstanding Staff Award; published paper</td>
</tr>
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<td>ENPMV Moving Allowance</td>
<td>515 Moving Allowance</td>
<td>Salary additive for moving expenses for new faculty/staff</td>
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<tr>
<td>ENPPP Practice Plan</td>
<td>131 Professional Payment Plan</td>
<td>Used by OSU-CHS – Practice Plan payments</td>
</tr>
</tbody>
</table>

11. Review the **Payroll ID** (defaulted to JM, OSU Monthly) and use the dropdown box to change if appropriate.

   - Select “JM, OSU Monthly” for the regular monthly payroll or “JX, OSU Supplemental” for the supplemental payroll. (Only select JM or JX – do **NOT** select any of the other Payroll IDs listed.)

12. Complete the Exception to Normal Pay Payment Information section:

   - **Effective Date** (defaulted to Query Date) – The date this action will affect payroll.
     - The Effective Date **MUST** be the first day of the month of the payroll on which the ENP will be processed. This date **MUST** be the same date as the Jobs Effective Date above.
   - **Earnings Code** – Select the appropriate Earnings Code from the dropdown box.
     - Only certain Earnings Codes can be used for this approval category. Others will result in an error message.
     - See the ENP Job Change Reason Codes and Earnings Codes Chart in Step 10 above and select the Earnings Code that corresponds with the Job Change Reason selected.
     - The Earnings Code is defaulted to a Regular Monthly Earnings Code; however, this will not result in regular pay as the job is defaulted to a zero rate. Only the additional Earnings Codes will result in payment.
   - **Hours or Units Per Pay** (defaulted to 173.33 if FTE = 1.0)
     - Enter the number “1”.
   - **Deemed Hours** – Leave this field blank.
   - **Special Rate** – The total amount the employee is to be paid.
   - **Shift** – Defaulted to 1. Do not change this field.
   - **End Date**
     - The End Date **MUST** be the first day of the following month. (For example, if the ENP will be paid on the August regular monthly payroll or August supplemental payroll, you **MUST** enter 09/01/YYYY.)

13. Review the **Effective Date** (defaulted to Query Date) for the funding information.

   - The Effective Date is the date this action will affect payroll.

14. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.

   - Chart (COA) **MUST** be X for the OSU System.
   - Funding total must equal 100%.
   - The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button.
remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or the Save button to remove the line.

15. In the Terminate / End Pay Job Record Only section, enter the **Jobs Effective Date**.
   - The Jobs Effective Date is the date this action will affect payroll. This date **MUST** be the last day of the month of the payroll on which the ENP will be processed. (For example, if the Job Begin Date is 08/01/YYYY, this date **MUST** be 08/31/YYYY.)

16. Enter the **Personnel Date**.
   - This date does **not** affect pay and serves as an information field for historical, audit, or reporting purposes. Use the same date as the Jobs Effective Date.

17. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   - A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements.

18. In the Comment box, enter comments with sufficient detail for the approvers to understand the ENP being processed.

19. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

20. Review and then click on the Submit button.
   - The routing process does not begin until you click on the Save button and then the Submit button.
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > Transfer EPAF Contact List, and open the Excel file.
   ✧ The Transfer EPAF Contact List will be used to determine the User Name to be entered in the Routing Queue for the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU).
   ✧ Make a note of the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from, or leave the list open on your computer so you can refer back to it for Step 28.
2. Select New EPAF.
3. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✧ Use % as the wildcard for searches.
4. Enter the Query Date (the date the action on the EPAF is to become effective).
   ✧ Enter the date the employee is to begin the NEW job (the job the employee is transferring to).
5. Select Approval Category Transfer to Hourly Job with No End Date, TRNJHN.
6. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✧ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✧ Only one job can be ended with a Transfer approval category. If the employee has multiple jobs that need to be ended, use the approval category Terminate – Job Record Only, TERMJB to end all jobs, with the exception of one (1) job. Then, use the Transfer approval category for the final job.
   ✧ Two (2) consecutive terminate dates are NOT allowed on a job record. If the employee is transferring from a position with an End Date (a Jobs Effective Date has been entered to Terminate/End Pay for the Job Record), contact Payroll Services to request that End Date be removed. After that date is removed, the Transfer EPAF can be processed.
7. Click on Go.
8. Select the radio button for the position the employee is transferring from.
   ✧ Note the heading for the box that contains the job information is labeled Terminate/End Pay Job Record Only. This indicates the job selected is the one that is being terminated.
9. Click on Next Approval Type.
   ✧ Do NOT select Go at this time. Selecting Go will result in the employee being transferred to the same job the employee is transferring from.
10. Enter the Position number and Suffix for the job the employee is transferring to.
   ✧ Note the heading for the box that contains the job information is labeled Transfer to Hourly Job. This indicates the job selected is the one the employee is transferring to.
   ✧ For the suffix, follow the same rules you would for a new hire or to add a new job (e.g., begin with the suffix 00.)
11. Click on Go.
   ✧ Do NOT select Next Approval Type a second time.
12. Note the sections on the EPAF form.
   ✧ The data in the Terminate/End Pay Job Record Only section is for the job the employee is transferring from.
   ✧ The data in the other sections (Transfer Employment Data, Transfer to Hourly Job, and Update Labor Distribution Information) is for the job the employee is transferring to.
13. In the Terminate/End Pay Job Record Only section, enter the Jobs Effective Date.
   ✧ The Jobs Effective Date is the last day the employee will be working in the job the employee is transferring from. This will normally be the day before the employee transfers to the new job; however, this date can be any date prior to the effective date of the new job (the job the employee is transferring to) and greater than or equal to the Last Paid Date of the prior job.
If the dates overlap on the job the employee is transferring from and the job the employee is transferring to, STOP. The overlap of dates will result in a problem if the Contract Type for the job the employee is transferring from is Primary and the job the employee is transferring to is Primary. If both are Primary, use the appropriate Change Job EPAF (Hourly, Monthly, or Work Study) to change the Contract Type from Primary to Secondary for the job the employee is transferring from. After the Change Job EPAF has been applied (not just submitted or approved), the Transfer EPAF can be used to complete the needed transfer.

14. Enter the Personnel Date for the position the employee is transferring from. This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.

15. Select the Job Change Reason from the dropdown box. See the Job Change Reason Codes List in Appendix A for additional information.

16. In the Transfer Employment Data section, review the data in the Current Value column. Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate based on the job the employee is transferring to.

- Employee Status (defaulted to Active)
- Employee Class Code
  - Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
- Home Organization
- Distribution Organization
  - The Distribution Organization code should be the same as the Home Organization.
- Benefit Category (defaulted to JE, All Deds/Bens – Used for trans)
  - If the employee is transferring to a job with the same Benefit Category as the job the employee is transferring from (e.g., transferring from a 1.0 FTE biweekly job to another 1.0 FTE biweekly job), select the same category from the dropdown box as the category listed in the Current Value column. Otherwise, leave the New Value as JE, All Ded/Bens – Used for trans.
  - If the Benefit Category is changing, the Benefit Category in the New Value column MUST be JE, All Deds/Bens – Used for trans. Current benefit deductions must be ended before the new deductions can be created. JE is a temporary transitional rule that will allow the Transfer EPAF to process and allow HR Benefits to review and make the appropriate changes.
  - If there is an increase or decrease to the employee's FTE between the job the employee is transferring from and the job the employee is transferring to, leave the Benefit Category as JE, All Deds/Bens – Used for trans.

17. In the Transfer to Hourly Job section, review the Job Begin Date (defaulted to Query Date) and change if appropriate.

- The Job Begin Date is the date the assignment begins (the first day the employee can start any time entry) for the job the employee is transferring to.
- This date should be the same as the Jobs Effective Date.

18. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.

- The Jobs Effective Date is the date this action will affect payroll.
- The Jobs Effective Date MUST be the same as the Job Begin Date.

19. Review the Personnel Date (defaulted to Query Date) and change if appropriate.

- This date does NOT affect pay and serves as an information field for historical, audit, or reporting purposes.

20. Review the Contract Type (defaulted to Primary) and use the dropdown box to change if appropriate.

- Primary – The employee’s primary job.
- Secondary – Used to add an additional position for an employee.
Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).

Each employee can have only one Primary job.

21. Review the Job Status (defaulted to Active) and use the dropdown box to change if appropriate.
   - Remove – Do not select Remove as the Job Status field must be populated.
   - Active
   - Leave without Pay, with Benefits
   - Leave without Pay, without Benefits
   - Leave with Pay, with Benefits
   - Leave with Partial Pay, with Benefits – Used for 60% LTD.
   - Terminated

22. Select the Job Change Reason from the dropdown box.
   - See the Job Change Reason Codes List in Appendix A for additional information.
   - In many cases, the Job Change Reason Code for the job the employee is transferring from should match the Job Change Reason Code for the job the employee is transferring to (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).

23. Enter the New Value for:
   - Regular Rate – Employee’s Pay Rate per Hour.
   - FTE – Full-Time Equivalent. (* Must be 1.0 or less)
   - Hours Per Day – Number of hours employee will work per day.
   - Hours Per Pay – Number of hours employee will work per pay period.
   - Timesheet Organization – Department timesheet organization number.

24. Review the Time Entry Method and change if appropriate.
   - Remove – Do not select Remove as the Time Entry Method field must be populated.
   - Payroll Time Entry – Do not select Payroll Time Entry.
   - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.).
   - Department Time Entry with Approvals – Used by OSU-CHS only.
   - Third Party with Approvals – TimePro, AiM, Kronos, etc.

25. Enter the new value for:
   - Title

26. Review the Effective Date (defaulted to Query Date) for the funding information and change if appropriate.
   - The Effective Date is the date this action will affect payroll.

27. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
   - Chart (COA) MUST be X for the OSU System.
   - Funding total must equal 100%.
   - The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.

28. Review the Routing Queue and use the magnifying glass to change or add User Name(s) as appropriate.
   - The Transfer EPAF must be approved by both the department the employee is transferring from and the department the employee is transferring to. Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU is for the job the employee is transferring from. Approval Level 10 – (DEPTHD) Department Head is for the job the employee is transferring to.
   - Refer back to Step 1 (and the Transfer EPAF Contact List) for the User Name to be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU. Enter the User Name listed in the Transfer EPAF Contact
List in column F for the College / Division the employee is transferring from. Only User Names found on the Transfer EPAF Contact List may be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU.

A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements. For Transfer EPAFs, the Originator may not be able to set up a default Routing Queue unless all transfers are from one common College / Division.

29. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

30. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

31. Review and then click on the Submit button.

The routing process does not begin until you click on the Save button and then the Submit button.

The Transfer EPAF will not move forward in the routing process until it has been approved by the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU) AND the department the employee is transferring to (Approval Level 10 – (DEPTHD) Department Head).
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > Transfer EPAF Contact List, and open the Excel file.
   ✴ The Transfer EPAF Contact List will be used to determine the User Name to be entered in the Routing Queue for the department the employee is transferring from (Approval Level 1 – (DHOUTJ) Dept Head Transfer Out OSU).
   ✴ Make a note of the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from, or leave the list open on your computer so you can refer back to it for Step 31.
2. Select New EPAF.
3. Enter the employee's Banner ID or use the magnifying glass to search by the employee's name.
   ✴ Use % as the wildcard for searches.
4. Enter the Query Date (the date the action on the EPAF is to become effective).
   ✴ Enter the date the employee is to begin the NEW job (the job the employee is transferring to).
5. Select Approval Category Transfer to Hourly Job with End Date, TRNJHE.
6. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✴ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✴ Only one job can be ended with a Transfer approval category. If the employee has multiple jobs that need to be ended, use the approval category Terminate – Job Record Only, TERMJB to end all jobs, with the exception of one (1) job. Then, use the Transfer approval category for the final job.
   ✴ Two (2) consecutive terminate dates are NOT allowed on a job record. If the employee is transferring from a position with an End Date (a Jobs Effective Date has been entered to Terminate/End Pay for the Job Record), contact Payroll Services to request that End Date be removed. After that date is removed, the Transfer EPAF can be processed.
7. Click on Go.
8. Select the radio button for the position the employee is transferring from.
   ✴ Note the heading for the box that contains the job information is labeled Terminate/End Pay Job Record Only. This indicates the job selected is the one that is being terminated.
9. Click on Next Approval Type.
   ✴ Do NOT select Go at this time. Selecting Go will result in the employee being transferred to the same job the employee is transferring from.
10. Enter the Position number and Suffix for the job the employee is transferring to.
    ✴ Note the heading for the box that contains the job information is labeled Transfer to Hourly Job. This indicates the job selected is the one the employee is transferring to.
    ✴ For the suffix, follow the same rules you would for a new hire or to add a new job (e.g., begin with the suffix 00.)
11. Click on Go.
    ✴ Do NOT select Next Approval Type a second time.
12. Note the sections on the EPAF form.
    ✴ The data in the Terminate/End Pay Job Record Only section is for the job the employee is transferring from.
    ✴ The data in the other sections (Transfer Employment Data, Transfer to Hourly Job, Update Labor Distribution Information, and Terminate/End Pay Transfer Job Record Only) is for the job the employee is transferring to.
13. In the Terminate/End Pay Job Record Only section, enter the Jobs Effective Date.
    ✴ The Jobs Effective Date is the last day the employee will be working in the job the employee is transferring from. This will normally be the day before the employee transfers to the new job; however, this date can be any date prior to the effective date of the new job (the job the employee is transferring to) and greater than or equal to the Last Paid Date of the prior job.
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14. Enter the Personnel Date for the position the employee is transferring from.
   This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.

15. Select the Job Change Reason from the dropdown box.
   See the Job Change Reason Codes List in Appendix A for additional information.
   In many cases, the Job Change Reason Code for the job the employee is transferring from should match the Job Change Reason Code for the job the employee is transferring to (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).

16. In the Transfer Employment Data section, review the data in the Current Value column. Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate based on the job the employee is transferring to.
   - Employee Status (defaulted to Active)
   - Employee Class Code
     Additional information and a list of Banner Employee Class Codes may be found at: http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf.
   - Home Organization
   - Distribution Organization
     The Distribution Organization code should be the same as the Home Organization.
   - Benefit Category (defaulted to JE, All Deds/Bens – Used for trans)
     If the employee is transferring to a job with the same Benefit Category as the job the employee is transferring from (e.g., transferring from a 1.0 FTE biweekly job to another 1.0 FTE biweekly job), select the same category from the dropdown box as the category listed in the Current Value column. Otherwise, leave the New Value as JE, All Ded/Bens – Used for trans.
     If the Benefit Category is changing, the Benefit Category in the New Value column MUST be JE, All Deds/Bens – Used for trans. Current benefit deductions must be ended before the new deductions can be created. JE is a temporary transitional rule that will allow the Transfer EPAF to process and allow HR Benefits to review and make the appropriate changes.
     If there is an increase or decrease to the employee's FTE between the job the employee is transferring from and the job the employee is transferring to, leave the Benefit Category as JE, All Deds/Bens – Used for trans.

17. In the Transfer to Hourly Job section, review the Job Begin Date (defaulted to Query Date) and change if appropriate.
   The Job Begin Date is the date the assignment begins (the first day the employee can start any time entry) for the job the employee is transferring to.
   This date should be the same as the Jobs Effective Date.

18. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.
   The Jobs Effective Date is the date this action will affect payroll.
   The Jobs Effective Date MUST be the same as the Job Begin Date.

19. Review the Personnel Date (defaulted to Query Date) and change if appropriate.
   This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.

20. Review the Contract Type (defaulted to Primary) and use the dropdown box to change if appropriate.
   - Primary – The employee's primary job.
   - Secondary – Used to add an additional position for an employee.
Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).

🔹 Each employee can have only one Primary job.

21. Review the **Job Status** (defaulted to Active) and use the dropdown box to change if appropriate.
   - Remove – Do not select Remove as the Job Status field must be populated.
   - Active
   - Leave without Pay, with Benefits
   - Leave without Pay, without Benefits
   - Leave with Pay, with Benefits
   - Leave with Partial Pay, with Benefits – Used for 60% LTD.
   - Terminated

22. Select the **Job Change Reason** from the dropdown box.
   - See the Job Change Reason Codes List in Appendix A for additional information.
   - In many cases, the Job Change Reason Code for the job the employee is transferring from should match the Job Change Reason Code for the job the employee is transferring to (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).

23. Enter the New Value for:
   - **Regular Rate** – Employee’s Pay Rate per Hour.
   - **FTE** – Full-Time Equivalent. (🔹 Must be 1.0 or less)
   - **Hours Per Day** – Number of hours employee will work per day.
   - **Hours Per Pay** – Number of hours employee will work per pay period.
   - **Timesheet Organization** – Department timesheet organization number.

24. Review the **Time Entry Method** and change if appropriate.
   - Remove – Do not select Remove as the Time Entry Method field must be populated.
   - Payroll Time Entry – Do not select Payroll Time Entry.
   - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.).
   - Department Time Entry with Approvals – Used by OSU-CHS only.
   - Third Party with Approvals – TimePro, AiM, Kronos, etc.

25. Enter the new value for:
   - **Title**

26. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
   - The Effective Date is the date this action will affect payroll.

27. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
   - Chart (COA) MUST be X for the OSU System.
   - Funding total must equal 100%.
   - The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.

28. In the Terminate/End Pay Transfer Job Record Only section, enter the **Jobs Effective Date**.
   - The Jobs Effective Date is the date this action will affect payroll. For biweekly employees, enter the last day of the pay period for which the terminate job record should be effective, and enter the actual last day of work as the Personnel Date.

29. Enter the **Personnel Date**.
   - This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
30. Review the **Job Change Reason** (defaulted to 2END, End of Appointment) and use the dropdown box to change if appropriate.
   ✴ See the Job Change Reason Codes List in Appendix A for additional information.

31. Review the Routing Queue and use the magnifying glass to change or add User Name(s) as appropriate.
   ✴ The Transfer EPAF must be approved by both the department the employee is transferring *from* and the department the employee is transferring *to*. Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU is for the job the employee is transferring *from*. Approval Level 10 – (DEPTHD) Department Head is for the job the employee is transferring *to*.
   ✴ Refer back to Step 1 (and the Transfer EPAF Contact List) for the User Name to be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU. Enter the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring *from*. Only User Names found on the Transfer EPAF Contact List may be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU.
   ✴ A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements. For Transfer EPAFs, the Originator may not be able to set up a default Routing Queue unless all transfers are from one common College / Division.

32. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

33. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

34. Review and then click on the Submit button.
   ✴ The routing process does not begin until you click on the Save button and then the Submit button.
   ✴ The Transfer EPAF will not move forward in the routing process until it has been approved by the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU) **AND** the department the employee is transferring to (Approval Level 10 – (DEPTHD) Department Head).
TRANSFER – EMPLOYEE TRANSFERRING TO A SALARIED JOB WITH NO END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > Transfer EPAF Contact List, and open the Excel file.
   ✶ The Transfer EPAF Contact List will be used to determine the User Name to be entered in the Routing Queue for the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU).
   ✶ Make a note of the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from, or leave the list open on your computer so you can refer back to it for Step 26.
2. Select New EPAF.
3. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✶ Use % as the wildcard for searches.
4. Enter the Query Date (the date the action on the EPAF is to become effective).
   ✶ Enter the date the employee is to begin the NEW job (the job the employee is transferring to).
5. Select Approval Category Transfer to a Salaried Job with No End Date, TRNJSN.
6. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✶ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✶ Only one job can be ended with a Transfer approval category. If the employee has multiple jobs that need to be ended, use the approval category Terminate – Job Record Only, TERMJB to end all jobs, with the exception of one (1) job. Then, use the Transfer approval category for the final job.
   ✶ Two (2) consecutive terminate dates are NOT allowed on a job record. If the employee is transferring from a position with an End Date (a Jobs Effective Date has been entered to Terminate/End Pay for the Job Record), contact Payroll Services to request that End Date be removed. After that date is removed, the Transfer EPAF can be processed.
7. Click on Go.
8. Select the radio button for the position the employee is transferring from.
   ✶ Note the heading for the box that contains the job information is labeled Terminate/End Pay Job Record Only. This indicates the job selected is the one that is being terminated.
9. Click on Next Approval Type.
   ✶ Do NOT select Go at this time. Selecting Go will result in the employee being transferred to the same job the employee is transferring from.
10. Enter the Position number and Suffix for the job the employee is transferring to.
    ✶ Note the heading for the box that contains the job information is labeled Transfer to Salaried Job. This indicates the job selected is the one the employee is transferring to.
    ✶ For the suffix, follow the same rules you would for a new hire or to add a new job (e.g., begin with the suffix 00.)
11. Click on Go.
    ✶ Do NOT select Next Approval Type a second time.
12. Note the sections on the EPAF form.
    ✶ The data in the Terminate/End Pay Job Record Only section is for the job the employee is transferring from.
    ✶ The data in the other sections (Transfer Employment Data, Transfer to Salaried Job, and Update Labor Distribution Information) is for the job the employee is transferring to.
13. In the Terminate/End Pay Job Record Only section, enter the Jobs Effective Date.
    ✶ The Jobs Effective Date is the last day the employee will be working in the job the employee is transferring from. This will normally be the day before the employee transfers to the new job; however, this date can be any date prior to the effective date of the new job (the job the employee is transferring to) and greater than or equal to the Last Paid Date of the prior job.
If the dates overlap on the job the employee is transferring from and the job the employee is transferring to, **STOP**. The overlap of dates will result in a problem if the Contract Type for the job the employee is transferring from is Primary and the job the employee is transferring to is Primary. If both are Primary, use the appropriate Change Job EPAF (Hourly, Monthly, or Work Study) to change the Contract Type from Primary to Secondary for the job the employee is transferring from. After the Change Job EPAF has been applied (not just submitted or approved), the Transfer EPAF can be used to complete the needed transfer.

14. Enter the **Personnel Date** for the position the employee is transferring from.  
   ✶ This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.

15. Select the **Job Change Reason** from the dropdown box. 
   ✶ See the Job Change Reason Codes List in Appendix A for additional information. 
   ✶ In many cases, the Job Change Reason Code for the job the employee is transferring from should match the Job Change Reason Code for the job the employee is transferring to (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).

16. In the Transfer Employment Data section, review the data in the Current Value column. Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate based on the job the employee is transferring to.
   - **Employee Status** (defaulted to Active) 
   - **Employee Class Code**
     ✶ Additional information and a list of Banner Employee Class Codes may be found at: [http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf](http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf)
   - **Home Organization**
   - **Distribution Organization**
     ✶ The Distribution Organization code should be the same as the Home Organization.
   - **Benefit Category** (defaulted to JE, All Deds/Bens – Used for trans)
     ✶ If the employee is transferring to a job with the same Benefit Category as the job the employee is transferring from (e.g., transferring from a 1.0 FTE monthly job to another 1.0 FTE monthly job), select the same category from the dropdown box as the category listed in the Current Value column. Otherwise, leave the New Value as JE, All Ded/Bens – Used for trans.
     ✶ If the Benefit Category is changing, the Benefit Category in the New Value column **MUST** be JE, All Deds/Bens – Used for trans. Current benefit deductions must be ended before the new deductions can be created. JE is a temporary transitional rule that will allow the Transfer EPAF to process and allow HR Benefits to review and make the appropriate changes.
     ✶ If there is an increase or decrease to the employee’s FTE between the job the employee is transferring from and the job the employee is transferring to, leave the Benefit Category as JE, All Deds/Bens – Used for trans.

17. In the Transfer to Salaried Job section, review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
   ✶ The Job Begin Date is the date the assignment begins for the job the employee is transferring to.
   ✶ This date should be the same as the Jobs Effective Date.

18. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   ✶ The Jobs Effective Date is the date this action will affect payroll.
   ✶ The Jobs Effective Date **MUST** be the same as the Job Begin Date.

19. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   ✶ **This date does not** affect pay and serves as an information field for historical, audit, or reporting purposes.

20. Review the **Contract Type** (defaulted to Primary) and use the dropdown box to change if appropriate.
   - Primary – The employee’s primary job.
   - Secondary – Used to add an additional position for an employee.
Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).

* Each employee can have only one Primary job.

21. Review the Job Status (defaulted to Active) and use the dropdown box to change if appropriate.
   - Remove – Do not select Remove as the Job Status field must be populated.
   - Active
   - Leave without Pay, with Benefits
   - Leave without Pay, without Benefits
   - Leave with Pay, with Benefits
   - Leave with Partial Pay, with Benefits – Used for 60% LTD.
   - Terminated

22. Select the Job Change Reason from the dropdown box.
   - See the Job Change Reason Codes List in Appendix A for additional information.
   - In many cases, the Job Change Reason Code for the job the employee is transferring from should match the Job Change Reason Code for the job the employee is transferring to (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).

23. Enter the new value as appropriate for:
   - Annual Salary / Contract Amount – Employee’s actual annual salary.
   - Factor – Used to calculate the amount per month to be paid.
     - Annual Salary (or Contract Amount) / Factor = Monthly Payment
     - As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for exempt staff members.
   - Pays – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)
     - For all new hires, Factor = Pays. Payroll Services will update the Pays field if a faculty member completes a deferral agreement.
     - Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.
   - FTE – Full-Time Equivalent. (Must be 1.0 or less)
   - Hours Per Day – Number of hours employee will work per day.
   - Hours Per Pay – Number of hours employee will work per pay period.
     - If the FTE for this employee is not 1.0, the Hours per Day and Hours per Pay (based on the FTE) MUST be entered.
   - Timesheet Organization – Department timesheet organization number.
   - Title

24. Review the Effective Date (defaulted to Query Date) for the funding information and change if appropriate.
   - The Effective Date is the date this action will affect payroll.

25. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
   - Chart (COA) MUST be X for the OSU System.
   - Funding total must equal 100%.
   - The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.

26. Review the Routing Queue and use the magnifying glass to change or add User Name(s) if appropriate.
   - The Transfer EPAF must be approved by both the department the employee is transferring from and the department the employee is transferring to. Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU is for the job the employee is transferring from. Approval Level 10 – (DEPTHD) Department Head is for the job the employee is transferring to.
**Refer back to Step 1 (and the Transfer EPAF Contact List) for the User Name to be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU.** Enter the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from. Only User Names found on the Transfer EPAF Contact List may be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU.  

**A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements. For Transfer EPAFs, the Originator may not be able to set up a default Routing Queue unless all transfers are from one common College / Division.**

27. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

28. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

29. Review and then click on the Submit button.

- The routing process does not begin until you click on the Save button and then the Submit button.
- The Transfer EPAF will not move forward in the routing process until it has been approved by the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU) **AND** the department the employee is transferring to (Approval Level 10 – (DEPTHD) Department Head).
1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > Transfer EPAF Contact List, and open the Excel file.
   ✶ The Transfer EPAF Contact List will be used to determine the User Name to be entered in the Routing Queue for the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU).
   ✶ Make a note of the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from, or leave the list open on your computer so you can refer back to it for Step 30.

2. Select New EPAF.

3. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✶ Use % as the wildcard for searches.

4. Enter the Query Date (the date the action on the EPAF is to become effective).
   ✶ Enter the date the employee is to begin the NEW job (the job the employee is transferring to).

5. Select Approval Category Transfer to a Salaried Job with End Date, TRNJS.

6. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✶ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✶ Only one job can be ended with a Transfer approval category. If the employee has multiple jobs that need to be ended, use the approval category Terminate – Job Record Only, TERMJB to end all jobs, with the exception of one (1) job. Then, use the Transfer approval category for the final job.
   ✶ Two (2) consecutive terminate dates are NOT allowed on a job record. If the employee is transferring from a position with an End Date (a Jobs Effective Date has been entered to Terminate/End Pay for the Job Record), contact Payroll Services to request that End Date be removed. After that date is removed, the Transfer EPAF can be processed.

7. Click on Go.

8. Select the radio button for the position the employee is transferring from.
   ✶ Note the heading for the box that contains the job information is labeled Terminate/End Pay Job Record Only. This indicates the job selected is the one that is being terminated.

9. Click on Next Approval Type.
   ✶ Do NOT select Go at this time. Selecting Go will result in the employee being transferred to the same job the employee is transferring from.

10. Enter the Position number and Suffix for the job the employee is transferring to.
    ✶ Note the heading for the box that contains the job information is labeled Transfer to Salaried Job. This indicates the job selected is the one the employee is transferring to.
    ✶ For the suffix, follow the same rules you would for a new hire or to add a new job (e.g., begin with the suffix 00.)

11. Click on Go.
    ✶ Do NOT select Next Approval Type a second time.

12. Note the sections on the EPAF form.
    ✶ The data in the Terminate/End Pay Job Record Only section is for the job the employee is transferring from.
    ✶ The data in the other sections (Transfer Employment Data, Transfer to Salaried Job, Update Labor Distribution Information, and Terminate/End Pay Transfer Job Record Only) is for the job the employee is transferring to.

13. In the Terminate/End Pay Job Record Only section, enter the Jobs Effective Date.
    ✶ The Jobs Effective Date is the last day the employee will be working in the job the employee is transferring from. This will normally be the day before the employee transfers to the new job; however, this date can be any date prior to the effective date of the new job (the job the employee is transferring to) and greater than or equal to the Last Paid Date of the prior job.
If the dates overlap on the job the employee is transferring from and the job the employee is transferring to, STOP. The overlap of dates will result in a problem if the Contract Type for the job the employee is transferring from is Primary and the job the employee is transferring to is Primary. If both are Primary, use the appropriate Change Job EPAF (Hourly, Monthly, or Work Study) to change the Contract Type from Primary to Secondary for the job the employee is transferring from. After the Change Job EPAF has been applied (not just submitted or approved), the Transfer EPAF can be used to complete the needed transfer.

14. Enter the Personnel Date for the position the employee is transferring from. This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.

15. Select the Job Change Reason from the dropdown box. See the Job Change Reason Codes List in Appendix A for additional information. In many cases, the Job Change Reason Code for the job the employee is transferring from should match the Job Change Reason Code for the job the employee is transferring to (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).

16. In the Transfer Employment Data section, review the data in the Current Value column. Do not enter information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate based on the job the employee is transferring to.

- **Employee Status** (defaulted to Active)
- **Employee Class Code**
  - Additional information and a list of Banner Employee Class Codes may be found at: [http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf](http://hr.okstate.edu/sites/default/files/docfiles/BannerHR-EClasses.pdf).
- **Home Organization**
- **Distribution Organization**
  - The Distribution Organization code should be the same as the Home Organization.
- **Benefit Category** (defaulted to JE, All Deds/Bens – Used for trans)
  - If the employee is transferring to a job with the same Benefit Category as the job the employee is transferring from (e.g., transferring from a 1.0 FTE monthly job to another 1.0 FTE monthly job), select the same category from the dropdown box as the category listed in the Current Value column. Otherwise, leave the New Value as JE, All Ded/Bens – Used for trans.
  - If the Benefit Category is changing, the Benefit Category in the New Value column MUST be JE, All Deds/Bens – Used for trans. Current benefit deductions must be ended before the new deductions can be created. JE is a temporary transitional rule that will allow the Transfer EPAF to process and allow HR Benefits to review and make the appropriate changes.
  - If there is an increase or decrease to the employee’s FTE between the job the employee is transferring from and the job the employee is transferring to, leave the Benefit Category as JE, All Deds/Bens – Used for trans.

17. In the Transfer to Salaried Job section, review the Job Begin Date (defaulted to Query Date) and change if appropriate.

- The Job Begin Date is the date the assignment begins for the job the employee is transferring to.
- This date should be the same as the Jobs Effective Date.

18. Review the Jobs Effective Date (defaulted to Query Date) and change if appropriate.

- The Jobs Effective Date is the date this action will affect payroll.
- The Jobs Effective Date MUST be the same as the Job Begin Date.

19. Review the Personnel Date (defaulted to Query Date) and change if appropriate.

- This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.

20. Review the Contract Type (defaulted to Primary) and use the dropdown box to change if appropriate.

- Primary – The employee’s primary job.
- Secondary – Used to add an additional position for an employee.
Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).

* Each employee can have only one Primary job.

21. Review the **Job Status** (defaulted to Active) and use the dropdown box to change if appropriate.
   - Remove – Do not select Remove as the Job Status field must be populated.
   - Active
   - Leave without Pay, with Benefits
   - Leave without Pay, without Benefits
   - Leave with Pay, with Benefits
   - Leave with Partial Pay, with Benefits – Used for 60% LTD.
   - Terminated

22. Select the **Job Change Reason** from the dropdown box.
   - See the Job Change Reason Codes List in Appendix A for additional information.
   - In many cases, the Job Change Reason Code for the job the employee is transferring from should match the Job Change Reason Code for the job the employee is transferring to (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).

23. Enter the new value as appropriate for:
   - **Annual Salary / Contract Amount** – Employee’s actual annual salary.
   - **Factor** – Used to calculate the amount per month to be paid.
     - Annual Salary (or Contract Amount) / Factor = Monthly Payment
     - As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for exempt staff members.
   - **Pays** – Pays = Factor (Exception: Faculty member with a salary deferral agreement.)
     - For all new hires, Factor = Pays. Payroll Services will update the Pays field if a faculty member completes a deferral agreement.
     - Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.
   - **FTE** – Full-Time Equivalent. (Must be 1.0 or less)
   - **Hours Per Day** – Number of hours employee will work per day.
   - **Hours Per Pay** – Number of hours employee will work per pay period.
     - If the FTE for this employee is not 1.0, the Hours per Day and Hours per Pay (based on the FTE) MUST be entered.
   - **Timesheet Organization** – Department timesheet organization number.

24. Review the **Effective Date** (defaulted to Query Date) for the funding information and change if appropriate.
   - The Effective Date is the date this action will affect payroll.

25. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
   - Chart (COA) MUST be X for the OSU System.
   - Funding total must equal 100%.
   - The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.

26. In the Terminate / End Pay Transfer Job Record Only section, enter the **Jobs Effective Date**.
   - The Jobs Effective Date is the date this action will affect payroll. Use the termination date – the last day the employee is scheduled to work in this position.

27. Enter the **Personnel Date**.
   - This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.
28. Review the **Job Change Reason** (defaulted to ZEND, End of Appointment) and use the dropdown box to change if appropriate.
   * See the Job Change Reason Codes List in Appendix A for additional information.

29. Review the **Job Status** (defaulted to Terminated) and use the dropdown box to change if appropriate.
   - Remove – Do not select Remove as the Job Status field must be populated.
   - Active – Do not select Active for this section of this approval category as this section is used to terminate or end pay for this job record.
   - Leave without Pay, with Benefits
   - Leave without Pay, without Benefits
   - Leave with Pay, with Benefits
   - Leave with Partial Pay, with Benefits – Used for 60% LTD.
   - Terminated

30. Review the Routing Queue and use the magnifying glass to change or add User Name(s) as appropriate.
   * The Transfer EPAF must be approved by both the department the employee is transferring from and the department the employee is transferring to. Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU is for the job the employee is transferring from. Approval Level 10 – (DEPTHD) Department Head is for the job the employee is transferring to.
   * Refer back to Step 1 (and the Transfer EPAF Contact List) for the User Name to be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU. Enter the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from. Only User Names found on the Transfer EPAF Contact List may be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU.
   * A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements. For Transfer EPAFs, the Originator may not be able to set up a default Routing Queue unless all transfers are from one common College / Division.

31. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.

32. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.

33. Review and then click on the Submit button.
   * The routing process does not begin until you click on the Save button and then the Submit button.
   * The Transfer EPAF will not move forward in the routing process until it has been approved by the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU) AND the department the employee is transferring to (Approval Level 10 – (DEPTHD) Department Head).
TRANSFER – EMPLOYEE TRANSFERRING TO A WORK STUDY JOB WITH NO END DATE

1. Log in and select Employee > Employee Self Service > Electronic Personnel Action Forms > Transfer EPAF Contact List, and open the Excel file.
   ✴️ The Transfer EPAF Contact List will be used to determine the User Name to be entered in the Routing Queue for the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU).
   ✴️ Make a note of the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from, or leave the list open on your computer so you can refer back to it for Step 28.
2. Select New EPAF.
3. Enter the employee’s Banner ID or use the magnifying glass to search by the employee’s name.
   ✴️ Use % as the wildcard for searches.
4. Enter the Query Date (the date the action on the EPAF is to become effective).
   ✴️ Enter the date the employee is to begin the NEW job (the job the employee is transferring to).
5. Select Approval Category Transfer to Work Study Job with No End Date, TRNJWN.
6. Click on the All Jobs button. Review current assignments under the Employee Job Assignments section.
   ✴️ Click on the All Jobs button below the Employee Job Assignments for a list of all jobs for the employee.
   ✴️ Only one job can be ended with a Transfer approval category. If the employee has multiple jobs that need to be ended, use the approval category Terminate – Job Record Only, TERMJB to end all jobs, with the exception of one (1) job. Then, use the Transfer approval category for the final job.
   ✴️ Two (2) consecutive terminate dates are NOT allowed on a job record. If the employee is transferring from a position with an End Date (a Jobs Effective Date has been entered to Terminate/End Pay for the Job Record), contact Payroll Services to request that End Date be removed. After that date is removed, the Transfer EPAF can be processed.
7. Click on Go.
8. Select the radio button for the position the employee is transferring from.
   ✴️ Note the heading for the box that contains the job information is labeled Terminate/End Pay Job Record Only. This indicates the job selected is the one that is being terminated.
9. Click on Next Approval Type.
   ✴️ Do NOT select Go at this time. Selecting Go will result in the employee being transferred to the same job the employee is transferring from.
10. Enter the Position number and Suffix for the job the employee is transferring to.
   ✴️ Note the heading for the box that contains the job information is labeled Transfer to Hourly Job. This indicates the job selected is the one the employee is transferring to.
   ✴️ For the suffix, follow the same rules you would for a new hire or to add a new job (e.g., begin with the suffix 00.)
11. Click on Go.
   ✴️ Do NOT select Next Approval Type a second time.
12. Note the sections on the EPAF form.
   ✴️ The data in the Terminate/End Pay Job Record Only section is for the job the employee is transferring from.
   ✴️ The data in the other sections (Transfer Employment Data, Transfer to Hourly Job, and Update Labor Distribution Information) is for the job the employee is transferring to.
13. In the Terminate/End Pay Job Record Only section, enter the Jobs Effective Date.
   ✴️ The Jobs Effective Date is the last day the employee will be working in the job the employee is transferring from. This will normally be the day before the employee transfers to the new job; however,
this date can be any date prior to the effective date of the new job (the job the employee is transferring to) and greater than or equal to the Last Paid Date of the prior job.

If the dates overlap on the job the employee is transferring from and the job the employee is transferring to, STOP. The overlap of dates will result in a problem if the Contract Type for the job the employee is transferring from is Primary and the job the employee is transferring to is Primary. If both are Primary, use the appropriate Change Job EPAF (Hourly, Monthly, or Work Study) to change the Contract Type from Primary to Secondary for the job the employee is transferring from. After the Change Job EPAF has been applied (not just submitted or approved), the Transfer EPAF can be used to complete the needed transfer.

14. Enter the **Personnel Date** for the position the employee is transferring from.
   ✴ This date does **not** affect pay and serves as an information field for historical, audit, or reporting purposes.

15. Select the **Job Change Reason** from the dropdown box.
   ✴ See the Job Change Reason Codes List in Appendix A for additional information.
   ✴ In many cases, the Job Change Reason Code for the job the employee is transferring from should match the Job Change Reason Code for the job the employee is transferring to (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).

16. In the Transfer Employment Data section, review the data in the Current Value column. **Do not enter** information in the New Value column unless there is no Current Value for a field or if the Current Value in a field is believed to be inaccurate based on the job the employee is transferring to.
   - **Employee Status** (defaulted to Active)
   - **Employee Class Code**
     ✴ Additional information and a list of Banner Employee Class Codes may be found at:
   - **Home Organization**
   - **Distribution Organization**
     ✴ The Distribution Organization code should be the same as the Home Organization.
   - **Benefit Category** (defaulted to JE, All Deds/Bens – Used for trans)
     ✴ If the employee is transferring to a job with the same Benefit Category as the job the employee is transferring from (e.g., transferring from a Work Study job to another Work Study job), select the same category from the dropdown box as the category listed in the Current Value column. Otherwise, leave the New Value as JE, All Ded/Bens – Used for trans.
     ✴ If the Benefit Category is changing, the Benefit Category in the New Value column MUST be JE, All Deds/Bens – Used for trans. Current benefit deductions must be ended before the new deductions can be created. JE is a temporary transitional rule that will allow the Transfer EPAF to process and allow HR Benefits to review and make the appropriate changes.
     ✴ If there is an increase or decrease to the employee’s FTE between the job the employee is transferring from and the job the employee is transferring to, leave the Benefit Category as JE, All Deds/Bens – Used for trans.

17. In the Transfer to Hourly Job section, review the **Job Begin Date** (defaulted to Query Date) and change if appropriate.
   - The Job Begin Date is the date the assignment begins (the first day the employee can start any time entry) for the job the employee is transferring to.
   - This date should be the same as the Jobs Effective Date.

18. Review the **Jobs Effective Date** (defaulted to Query Date) and change if appropriate.
   - The Jobs Effective Date is the date this action will affect payroll.
   - The Jobs Effective Date MUST be the same as the Job Begin Date.

19. Review the **Personnel Date** (defaulted to Query Date) and change if appropriate.
   - This date does **not** affect pay and serves as an information field for historical, audit, or reporting purposes.

20. Review the **Contract Type** (defaulted to Primary) and use the dropdown box to change if appropriate.
Primary – The employee’s primary job.
Secondary – Used to add an additional position for an employee.
Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class, a faculty member on a 9 month contract who has a summer assignment, housing or car allowance, etc.).

Each employee can have only one Primary job.

21. Review the Job Status (defaulted to Active) and use the dropdown box to change if appropriate.
   - Remove – Do not select Remove as the Job Status field must be populated.
   - Active
   - Leave without Pay, with Benefits
   - Leave without Pay, without Benefits
   - Leave with Pay, with Benefits
   - Leave with Partial Pay, with Benefits – Used for 60% LTD.
   - Terminated

22. Select the Job Change Reason from the dropdown box.
    - See the Job Change Reason Codes List in Appendix A for additional information.
    - In many cases, the Job Change Reason Code for the job the employee is transferring from should match the Job Change Reason Code for the job the employee is transferring to (e.g., for a lateral transfer, the Job Change Reason Code for both will be CTRAN).

23. Enter the New Value for:
   - Regular Rate – Employee’s Pay Rate per Hour.
   - FTE – Full-Time Equivalent. (Must be 1.0 or less)
   - Hours Per Day – Number of hours employee will work per day.
   - Hours Per Pay – Number of hours employee will work per pay period.
   - Timesheet Organization – Department timesheet organization number.

24. Review the Time Entry Method and change if appropriate.
   - Remove – Do not select Remove as the Time Entry Method field must be populated.
   - Payroll Time Entry – Do not select Payroll Time Entry.
   - Employee Time Entry via Web – The default is Employee Time Entry via Web. Do not change this field unless your department already uses an approved third party timekeeping system (e.g., TimePro, AiM, Kronos, etc.).
   - Department Time Entry with Approvals – Used by OSU-CHS only.
   - Third Party with Approvals – TimePro, AiM, Kronos, etc.

25. Enter the new value for:
   - Title

26. Review the Effective Date (defaulted to Query Date) for the funding information and change if appropriate.
    - The Effective Date is the date this action will affect payroll.

27. Review the funding information (defaulted based on the position number) in the New section and change if appropriate.
    - Chart (COA) MUST be X for the OSU System.
    - Funding total must equal 100%.
    - The Labor Distribution Percentage on each line must be between .01 and 100. When changing a line to 0%, that line must be removed. After entering 0 in the percent field, hit the Enter key or the Save button. A remove box will appear for each line. Click on the remove box in the line to be removed, then hit the Enter key or Save button to remove the line.

28. Review the Routing Queue and use the magnifying glass to change or add User Name(s) as appropriate.
    - The Transfer EPAF must be approved by both the department the employee is transferring from and the department the employee is transferring to. Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU is for the job the employee is transferring from. Approval Level 10 – (DEPTHD) Department Head is for the job the employee is transferring to.
スターク Refer back to Step 1 (and the Transfer EPAF Contact List) for the User Name to be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU. Enter the User Name listed in the Transfer EPAF Contact List in column F for the College / Division the employee is transferring from. Only User Names found on the Transfer EPAF Contact List may be entered for Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU.スターク A College / Division may have established specific routing instructions and/or requirements. Check with your College / Division before setting up a default Routing Queue to ensure compliance with those instructions and/or requirements. For Transfer EPAFs, the Originator may not be able to set up a default Routing Queue unless all transfers are from one common College / Division.

29. In the Comment box, enter comments with sufficient detail for the approvers to understand the change to the job record.
30. Click on the Save button, and check the top of the EPAF to make sure the action was saved successfully.
31. Review and then click on the Submit button.
スターク The routing process does not begin until you click on the Save button and then the Submit button.
スターク The Transfer EPAF will not move forward in the routing process until it has been approved by the department the employee is transferring from (Approval Level 12 – (DHOUTJ) Dept Head Transfer Out OSU) AND the department the employee is transferring to (Approval Level 10 – (DEPTHD) Department Head).
### APPENDIX A – JOB CHANGE REASON CODES LIST

<table>
<thead>
<tr>
<th>Job Change Type</th>
<th>Description</th>
<th>Job Change Reason Code</th>
<th>Description</th>
<th>Use / Additional Information &amp; Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR</td>
<td>Hire Action</td>
<td>1CURR</td>
<td>Concurrent Appointment</td>
<td>Employee has another active job at the same time</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1LTD</td>
<td>Employee LTD</td>
<td>Employee starting LTD (Used by Absence Manager)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1NEW</td>
<td>New Hire</td>
<td>Employee has never worked for OSU</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1REH</td>
<td>Rehire</td>
<td>Employee has been separated from OSU and is returning</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1REIN</td>
<td>Reinstall</td>
<td>Employee with benefits is returning within 30 days of separation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>IRET</td>
<td>Employee Retirement</td>
<td>Employee starting retirement (Used by Payroll)</td>
</tr>
<tr>
<td>SA</td>
<td>Salary Adjustment</td>
<td>CCDP</td>
<td>Career Development Increase</td>
<td>Increase in Career Development Plan</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CCDPX</td>
<td>Career Development Increase / Exception</td>
<td>Increase in Career Development Plan &gt;10%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CDEM</td>
<td>Demotion</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>CDPI</td>
<td>Demonstrated Proficiency Increase</td>
<td>Employee receives a raise due to increased volume of work or duties</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CDPIX</td>
<td>Demonstrated Proficiency Increase / Exception</td>
<td>Employee receives a raise &gt;10% due to increase of volume of work or duties</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CEQI</td>
<td>Equity Increase</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>CEQIX</td>
<td>Equity Increase / Exception</td>
<td>Employee receives a raise due to a formal pay study conducted by HR</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CFTED</td>
<td>Work Hours / FTE Decrease</td>
<td>Employee will begin working less hours</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CFTEI</td>
<td>Work Hours / FTE Increase</td>
<td>Employee will begin working more hours</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CINC</td>
<td>Incentive Pay Increase</td>
<td>Incentive provided for education attainment, professional cert, etc.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CINCX</td>
<td>Incentive Pay Increase / Exception</td>
<td>Incentive &gt;10% provided for education attainment, professional cert, etc</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CINT</td>
<td>Interim Increase</td>
<td>Employee is receiving additional payment for interim roll</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CINTX</td>
<td>Interim Increase / Exception</td>
<td>Employee is receiving additional payment for interim roll &gt;10%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CJEV</td>
<td>Job Evaluation Adjustment</td>
<td>Employee is receiving an adjustment due to evaluation of job duties</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CRCL</td>
<td>Reclassification</td>
<td>A change in PCLASS and/or ECLASS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CRCLX</td>
<td>Reclassification / Exception</td>
<td>A change in PCLASS and/or ECLASS with an increase &gt;10%</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
<td>Notes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>------</td>
<td>----------------------------------</td>
<td>----------------------------------------------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>XP</td>
<td>Extra Pay</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>XCHNG</td>
<td>Change Additive Pay</td>
<td>Change is being made to additive pay</td>
<td></td>
<td></td>
</tr>
<tr>
<td>XNEW</td>
<td>Enter New Additive Pay</td>
<td>Additive pay is beginning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>XSTOP</td>
<td>Stop Additive Pay</td>
<td>Additive pay is stopping</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CH</td>
<td>Other Change</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CDATA</td>
<td>Data Correction</td>
<td>Data correction is being made for an existing job record</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CFLSA</td>
<td>FLSA Regulatory Changes</td>
<td>Change due to FLSA regulations (Used by HR)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CFREG</td>
<td>Federal Regulatory Changes</td>
<td>Changes due to federal regulations (Used by HR)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CLOC</td>
<td>Job Location Change</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CMER</td>
<td>Merit Increase / State</td>
<td>Employee is receiving an increase based on merit program</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CMERX</td>
<td>Merit Increase / State / Exception</td>
<td>Employee is receiving an increase &gt;10% based on merit program</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CPRO</td>
<td>Promotion</td>
<td>Employee is receiving a promotion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CPROX</td>
<td>Promotion / Exception</td>
<td>Employee is receiving a promotion &gt;10%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CSUPV</td>
<td>Supervisor Change</td>
<td>Employee has a change of supervisor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CTRAN</td>
<td>Lateral Transfer</td>
<td>Employee is transferring to a lateral position</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CITLE</td>
<td>Title Change</td>
<td>Employee position title is changing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FYBUD</td>
<td>Fiscal Year Budget</td>
<td>Used once salary planner is finished (system generated)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FYREP</td>
<td>Fiscal Year Budget Replacement</td>
<td>Replacing budget from Salary Planner update (Used only to update errors)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LV</td>
<td>Leave</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LAYOF</td>
<td>Layoff</td>
<td>Employee is starting layoff rights</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LRET</td>
<td>Return from Leave</td>
<td>Employee is returning from approved leave (Update status to Active)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LSABB</td>
<td>Sabbatical Leave</td>
<td>Faculty is starting a sabbatical</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LSWOP</td>
<td>Suspension without Pay</td>
<td>Employee is suspended without pay</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LSWP</td>
<td>Suspension with Pay</td>
<td>Employee is suspended with pay</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LWC</td>
<td>Leave Workers Comp</td>
<td>Employee is on leave due to workers’ comp</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LWOP</td>
<td>Leave without Pay</td>
<td>Employee is on leave without pay</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LWOP</td>
<td>Leave with Pay</td>
<td>Employee is on leave with pay</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TA</td>
<td>Termination</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2END</td>
<td>End of Appointment</td>
<td>Job assignment has ended</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2FND</td>
<td>Funding Expiration</td>
<td>Funding has ended (typically used for grants)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2LTD</td>
<td>Employee LTD</td>
<td>Employee is starting LTD (used by campus)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2RET</td>
<td>Employee Retirement</td>
<td>Employee is retiring (used by campus)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2SEP</td>
<td>Employee Separation</td>
<td>Employee is separating from employment (used by campus)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>XTND</td>
<td>Extended Pay Date</td>
<td>Job is extended to pay past job end date (used by Payroll)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## APPENDIX B – ENP JOB CHANGE REASON CODES AND EARNINGS CODES CHART

<table>
<thead>
<tr>
<th>Job Change Reason</th>
<th>Earnings Code</th>
<th>Use / Additional Information &amp; Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENPSP Special Projects</td>
<td>130 Extra Time Pay</td>
<td>Extra work; grading papers; special short-term projects</td>
</tr>
<tr>
<td>ENPRP Retroactive Pay</td>
<td>A10 Regular Monthly Adj</td>
<td>EPAF was late and employee was not paid; adjustment to a payment received in a prior month</td>
</tr>
<tr>
<td>ENPIN Incentive Pay</td>
<td>081 Approved Incentive Plans</td>
<td>Certificate Programs (e.g., Ambassador Program, Leadership Program)</td>
</tr>
<tr>
<td>ENPAW Awards</td>
<td>080 Awards</td>
<td>Award for Excellence; Outstanding Staff Award; published paper</td>
</tr>
<tr>
<td>ENPMV Moving Allowance</td>
<td>515 Moving Allowance</td>
<td>Salary additive for moving expenses for new faculty/staff</td>
</tr>
<tr>
<td>ENPPP Practice Plan</td>
<td>131 Professional Payment Plan</td>
<td>Used by OSU-ChS – Practice Plan payments</td>
</tr>
</tbody>
</table>
APPENDIX C – ENP DATE CHART – EXAMPLE FOR ENPNEW

The regular monthly payroll will pay on the last day of the month and the supplemental payroll will pay on the 12th of the FOLLOWING month, unless the 12th is a non-working day.

<table>
<thead>
<tr>
<th>Pay Period</th>
<th>Exception to Normal Pay Add New Job</th>
<th>Exception to Normal Pay Payment Information</th>
<th>Update Labor Distribution Information</th>
<th>Terminate / End Pay Job Record Only</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Pay Date ²</td>
<td>Query Date</td>
<td>Job Begin Date</td>
<td>Job Effective Date</td>
</tr>
<tr>
<td>July</td>
<td>Regular</td>
<td>07/31/YYYY</td>
<td>07/01/YYYY</td>
<td>07/01/YYYY</td>
</tr>
<tr>
<td></td>
<td>Supplemental</td>
<td>08/12/YYYY</td>
<td>09/01/YYYY</td>
<td>09/01/YYYY</td>
</tr>
<tr>
<td>August</td>
<td>Regular</td>
<td>08/31/YYYY</td>
<td>08/01/YYYY</td>
<td>08/01/YYYY</td>
</tr>
<tr>
<td></td>
<td>Supplemental</td>
<td>09/12/YYYY</td>
<td>09/01/YYYY</td>
<td>09/01/YYYY</td>
</tr>
<tr>
<td>September</td>
<td>Regular</td>
<td>09/30/YYYY</td>
<td>09/01/YYYY</td>
<td>09/01/YYYY</td>
</tr>
<tr>
<td></td>
<td>Supplemental</td>
<td>10/12/YYYY</td>
<td>10/01/YYYY</td>
<td>10/01/YYYY</td>
</tr>
<tr>
<td>October</td>
<td>Regular</td>
<td>10/31/YYYY</td>
<td>10/01/YYYY</td>
<td>10/01/YYYY</td>
</tr>
<tr>
<td></td>
<td>Supplemental</td>
<td>11/12/YYYY</td>
<td>11/01/YYYY</td>
<td>11/01/YYYY</td>
</tr>
<tr>
<td>November</td>
<td>Regular</td>
<td>11/30/YYYY</td>
<td>11/01/YYYY</td>
<td>11/01/YYYY</td>
</tr>
<tr>
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<td>Supplemental</td>
<td>12/12/YYYY</td>
<td>12/01/YYYY</td>
<td>12/01/YYYY</td>
</tr>
<tr>
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<td>04/01/YYYY</td>
<td>04/01/YYYY</td>
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<tr>
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<td>07/01/YYYY</td>
<td>07/01/YYYY</td>
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</tbody>
</table>

¹ - Similar dates would be used for the approval category ENPRJB; however, the first section on the EPAP will be titled Exception to Normal Pay Reactivate Existing Job, and the Job Begin Date field will not appear in that section.

² - Pays on the 12th of the following month, unless the 12th is a non-working day.
### APPENDIX D – SUFFIX – TYPE OF PAYMENT CHART

<table>
<thead>
<tr>
<th>Type of Payment</th>
<th>Suffix</th>
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<tbody>
<tr>
<td>Exception to Normal Pay</td>
<td>Z0 through Z9</td>
</tr>
<tr>
<td>Auto Allowance</td>
<td>AU</td>
</tr>
<tr>
<td>Summer Appointment</td>
<td>Begins with S</td>
</tr>
<tr>
<td>Faculty Endowment</td>
<td>F1</td>
</tr>
<tr>
<td>Department / College / Division Administrative Additive</td>
<td>D1</td>
</tr>
</tbody>
</table>
## Updates:

<table>
<thead>
<tr>
<th>Date</th>
<th>Description of Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>10-13-2017</td>
<td>Step-by-step instructions were added for ENP approval categories. Appendix B (ENP Job Change Reason Codes and Earnings Codes Chart) and Appendix C (ENP Date Chart) were added.</td>
</tr>
<tr>
<td>10-13-2017</td>
<td>For New Employee – Hourly and Work Study approval categories, the Current Hire Date in the Create/Change PEAEMPL Record section is no longer defaulted to the Query Date. Default wording was removed. Additional wording was added to all New Employee approval categories about the Current Hire Date.</td>
</tr>
<tr>
<td>10-13-2017</td>
<td>For New Employee and Add a Job approval categories, information was added about the Suffix field. Appendix D (Suffix – Type of Payment Chart) was added.</td>
</tr>
<tr>
<td>10-18-2017</td>
<td>Step-by-step instructions were added for an Hourly Employee with an End Date (New Employee, Add a Job, and Reactivate a Job approval categories).</td>
</tr>
<tr>
<td>11-01-2017</td>
<td>Step-by-step instructions were added for the Reactivate a Job Record – Work Study approval category.</td>
</tr>
<tr>
<td>11-01-2017</td>
<td>Additional wording was added to instruct the originator to check for specific instructions and/or requirements a College / Division may have related to routing.</td>
</tr>
<tr>
<td>02-21-2018</td>
<td>For the Terminate – Job Record and Employee approval category, Last Work Date was added, and the Termination Date and Last Work Date default to the Query Date.</td>
</tr>
<tr>
<td>03-06-2018</td>
<td>Step-by-step instructions were added for Transfer approval categories.</td>
</tr>
<tr>
<td>04-05-2018</td>
<td>For all Transfer EPAFs, Approval Level for (DHOUTJ) Dept Head Transfer Out OSU (for the job the employee is transferring from) was changed from 10 to 12 to address issues caused when the same person is entered for the job the employee is transferring to.</td>
</tr>
</tbody>
</table>