

Tips, Tricks, and Frequently Asked Questions

Electronic Personnel Action Forms (EPAFs)

When I have questions regarding EPAFs, who should I contact?

It is recommended that you first start with your College/Division's Administrative Office. Questions can also be fielded through your HR Partner (<http://hr.okstate.edu/hr/hrcontacts>).

How do I add a user to an approval level?

At this time, adding an approver to a level can be done by sending an email to Jennifer Moody (jennifer.moody@okstate.edu) or Jeff Barker (jeffrey.barker@okstate.edu). Remember, that person will need to have EPAF access as well and should take the online approver training available at www.talent.okstate.edu if they have not already had training.

How do I remove a future effective date?

Requests for removing future effective dates should be made to Payroll via their designated email address: payrollepaf@okstate.edu

Where can I find the the schedule for EPAF deadlines?

Please refer to the Payroll Processing Schedules & Deadlines located at <http://payroll.okstate.edu/schedules-deadlines>.

What is the EPAF Approval Routing for OSU Payroll Services?

All Biweekly EPAFs should be routed to Debra Higgins and all Monthly EPAFs should be routed to Gwen Budzene. All Labor Distribution EPAFs should be routed to Joy MacDonald.

Helpful Tips

- All EPAFs that impact a given pay period must be fully approved and applied by the beginning of that pay period in order to be effective in that pay period.
- This includes EPAFs for rate changes, FTE changes, position changes, etc.
- ENPs will have to be done for retroactive pay increases.
- The only exceptions are new hires, employees without a current paid assignment, or employees adding an additional position.
- Best practice is to have rate increases effective on the first day of a pay period only.
- It is important that EPAFs are processed timely. When an EPAF is late, and the employee's job is not updated on time, the employee might be underpaid or overpaid, and the department must take additional manual steps to rectify the situation.
- EPAFs need to be approved and applied to Banner before the deadline based on the payroll processing schedule, found at <http://payroll.okstate.edu/schedules-deadlines>. If the EPAF does not get applied before the deadline, it will reject at the time it is applied due to effective date

errors. In this case, you will need to return your EPAF for correction, update the effective dates to a date following the last paid date, and resubmit the EPAF. The personnel date may remain the same.

- Employees may only have one Primary job. All other assignments should be either Secondary or Overload. If the employee has two or more of the same kind of job (for instance two or more bi-weekly non-exempt positions), then one would be primary, and others would be secondary. Overload is used for additional non-benefited supplemental job assignments.
- When submitting multiple EPAFs for the same person, please submit one EPAF per job at a time, in consecutive order. For example, the Primary job EPAF should be applied first. More than one Secondary and/or Overload EPAF can be submitted for the same person at a time, if each EPAF is for a different job (different position number or suffix).
- When preparing a Terminate Job Record EPAF, please choose the appropriate Job Change Reason (for example: 2SEP: Employment Separation, 2END: End of Assignment, etc.).
- In most cases, FTE, Hours Per Day, and Hours Per Pay should be consistent with one another. (Example: 0.25 FTE=2 Hours Per Day=20 Hours Per Pay (Hourly)=43.33 Hours Per Pay (Monthly). The system will not accept Hours Per Day of less than 1, but you can use less than an FTE of .125. (Example: .06 FTE=1 Hour Per Day (may not be less than 1)=4.8 Hours Per Pay (Hourly)=10.40 Hours Per Pay (Monthly). It is important that FTE be a true and accurate reflection of the job assignment.
- All Faculty EPAFs should be created using the position number and suffix 00 for the regular contract period and the contract dates should be added to the comments section of the EPAF for Payroll use. When adding additional summer overload payments for Faculty, use the same position number with suffix SM for summer.
- When preparing a Retirement EPAF, select Approval Category: Terminate – Job Record Only, TERMJB. Do not select Terminate – Job Record and Employee, TERME, as this will separate the employee completely and not allow for retirement benefits.

Adding a Job:

Common errors have occurred for users when creating an Add Job EPAF. When creating a new Job, be sure to enter a new position number and suffix in the fields provided. Then click GO to continue to the

EPAF screen.

ID: Dewey Bogus Duck, A20054341
 Query Date: Jul 15, 2016
 Approval Category: Add Job Record Hourly, ADDJBH

Hourly - Add Job Record, ADDJBH

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									<input checked="" type="radio"/>
	Primary	B99999	00	Admin Svcs Supervisor	100157, Human Resources	Apr 20, 2016			Active	<input type="radio"/>

Re-activating a previous job:

When reactivating a previous job, you may query using an earlier date when the previous job was active. For instance, if you are reactivating a Student Worker position in August, and the employee previously had a Spring job assignment that ended May, you can use a query date in May to find the previous assignment. Click Go to continue to the Job Selection screen.

ID: *

Query Date: MM/DD/YYYY* 05/01/2016

Approval Category: * Hourly - Reactivate Job Record, REJBH

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	704050	00	STUDENT EMPLOYMENT	100116, Learning & Student Success Opp Ctr	Jan 05, 2016	May 06, 2016	Jan 30, 2016	Active

Select the radio button next to the previous job and click Go to continue to the EPAF.

ID:

Query Date: May 01, 2016

Approval Category: Reactivate Job Record Hourly, REJBH

Reactivate Terminated Hourly Job, REJBH

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job									<input type="radio"/>
	Primary	704050	00	STUDENT EMPLOYMENT	100116, Learning & Student Success Opp Ctr	Jan 05, 2016	May 06, 2016	Jan 30, 2016	Active	<input checked="" type="radio"/>

Your query date of May 1, 2016 will populate in the date fields in the actual EPAF. You must remember to change the Jobs Effective Date, Personnel Date, and Funding Effective Date to the new effective date.

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	01/05/2016	08/08/2016
Job Status: *	Active	Active
Personnel Date: MM/DD/YYYY*	03/17/2016	08/08/2016
Job Change Reason: *	1NEW	1REH, Rehire
Contract Type: *	Primary	Primary
Title:	STUDENT EMPLOYMENT	Student Worker
FTE: *	.5	.50
Hours per Day: *	4	4
Hours per Pay: *	40	40
Regular Rate: *	9	9.00
Timesheet Orgn: *	100116	100116
Job End Date: MM/DD/YYYY(Not Enterable) 05/06/2016		-

Current
Effective Date: 01/05/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
X		122155	100116	602460	3700		1			100.00			

New
Effective Date: MM/DD/YYYY: 08/08/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
X		122155	100116	602460	3700		1			100.00			

Comments on the EPAF

Comments regarding what you are trying to accomplish is very helpful. Also add a contact name and phone number.

For example: If you are processing a "Terminate Job Record Only" EPAF, please indicate in the comments whether the employee will be transferring to another department, moving to a new position, returning in the Spring or Fall, etc. Also indicate the date of the transfer, new effective date, return date, etc. This is very helpful information for Benefits Technical in regards to what coding needs to be done for benefits.

When preparing a Terminate Job Record and Employee EPAF, please include the amount of annual leave that is to be paid out to the employee in the comments section.

Job Change Reason List:

Chg Reason	Description	Type
1CURR	Concurrent Appointment	Hire Action
1LTD	Employee LTD	Hire Action
1NEW	New Hire	Hire Action
1REH	Rehire	Hire Action
1REIN	Reinstate	Hire Action
1RET	Employee Retirement	Hire Action
2END	End of Appointment	Termination
2FND	Funding Expiration	Termination
2LTD	Employee LTD	Termination
2RET	Employee Retirement	Termination
2SEP	Employment Separation	Termination

CCDP	Career Development Increase	Salary Adjustment
CCDPX	Career Development Inc/Exceptn	Salary Adjustment
CDEM	Demotion	Salary Adjustment
CDPI	Demonstrated Prof Increase	Salary Adjustment
CDPIX	Demonstrated Prof Inc/Exceptn	Salary Adjustment
CEQI	Equity Increase	Salary Adjustment
CEQIX	Equity Increase/Exceptn	Salary Adjustment
CFTED	Work Hours/FTE Decrease	Salary Adjustment
CFTEI	Work Hours/FTE Increase	Salary Adjustment
CINC	Incentive Pay Increase	Salary Adjustment
CINCX	Incentive Pay Inc/Exceptn	Salary Adjustment
CINT	Interim Increase	Salary Adjustment
CINTX	Interim Inc/Exceptn	Salary Adjustment
CJEV	Job Evaluation Adj	Salary Adjustment
CLOC	Job Location Change	Other Change
CMER	Merit Increase/State	Other Change
CMERX	Merit Increase/State/Exceptn	Other Change
CPRO	Promotion	Other Change
CPROX	Promotion/Exceptn	Other Change
CRCL	Reclassification	Salary Adjustment
CRCLX	Reclassification/Exceptn	Salary Adjustment
CSUPV	Supervisor Change	Other Change
CTRAN	Lateral Transfer	Other Change
CTTLE	Title Change	Other Change
LAYOF	Layoff	Leave
LRET	Return from Leave	Leave
LSWOP	Suspension without Pay	Leave
LSWP	Suspension with Pay	Leave
LWOP	Leave without Pay	Leave
LWP	Leave with Pay	Leave
XCHNG	Change Additive Pay	Extra Pay
XNEW	Enter New Additive Pay	Extra Pay
XSTOP	Stop Additive Pay	Extra Pay
XTND	Extended Pay Date	Termination

Errors and Warnings

Begin Date must equal the first Jobs Detail Effective Date – This error occurs when creating an Hourly or Monthly Add Job Record EPAF and the employee held the job previously. In this case, change the Job Begin Date to match the current value, which is the previous begin date for the job. You may leave the Jobs Effective Date and Personnel Date as the new effective date of the action, or start of the new job assignment.

Effective Date must be greater than Last Paid Date of XX-XX-XXXX – This error will occur when the Jobs Effective Date is prior to the last paid date. You must change the Jobs Effective to a date greater than the Last Paid Date (For instance the first day of the new pay period), which is the earliest date that the change will affect payroll. The Personnel Date should be the true action date and has no effect on pay.

Annual Salary is outside of Table/Grade range – please disregard this warning.

First Name, SSN/SIN, Birth Date or Gender incomplete – contact HR Admin regarding the PEAEMPL Record. You may be required to submit the employee's social security card and PIF.

New Effective Date cannot be after Employee's Termination Date – This error may occur when you are creating an Add Job or Reactivate Job Record, but the employment relationship has been previously terminated in the Banner system. In this case, you will need to create a New Employee EPAF.

Termination Date has to be >= Jobs End date – This error may occur when you are processing a Terminate Job Record and Employee, but the employee's job assignment has a future end date. In this case, contact payrollepaf@okstate.edu and request that the future end date be removed.

Current hire date must be later than original hire date – This may occur if the Hire Date entered on the Banner PEAEMPL Record is later than the hire date you are processing on the New Employee EPAF. Contact HR Admin regarding the error.

The future dated Job record must be deleted before ending Job – This error will occur when you are processing an end date, but a later end date already exists for the job in the Banner system. Contact payrollepaf@okstate.edu and request that the future end date be removed.

New Effective date must be greater than last date of XX-XX-XXXX – This error will occur when processing a Change Job Record or Labor Distribution Change and a future effective date already occurs in the system. In this case, the future change must be removed from the system in order for this transaction to apply. Contact payrollepaf@okstate.edu and request that the future effective date be removed.

Position Labor Distribution not found for position and fiscal year – contact HR Partner to verify position funding set up.

Routing Queues

When selecting User Names for each Approval Level in the queue, select the magnifying glass to find the user.

Approval Category: Hourly - Add Job Record, ADDJBH

Approval Queue

Approval Level	User Name	Required Action
10 - (DEPTHD) Department Head	<input type="text"/>	Approve
20 - (HRADMN) HR Administration	<input type="text"/>	Approve
20 - (HRPS) HR - Partner Services	<input type="text"/>	FYI

Default Routing Queues

It is recommended that you set up your default routing queues for EPAFS that you use on a regular basis. This will save you time and allow for efficiency when creating EPAFS. Please use the minimum number approvers necessary for your business purpose.

In the event you receive the following error when setting up and saving your default routing queue, this indicates that you do not have all mandatory levels selected.

! Mandatory levels and Required Action must match the levels that are established for the category.

If you have trouble editing your default routing queue, the best option is to select the “Remove” box for every level and click “Save and Add New Rows”.

! Mandatory levels and Required Action must match the levels that are established for the category.

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category: Monthly no end date - Reactivate Job Record, REJBS2

Approval Queue

Approval Level	User Name	Required Action	Remove
10 - (DEPTHD) Department Head	<input type="text"/>	Approve	<input checked="" type="checkbox"/>
20 - (HRPS) HR - Partner Services	<input type="text"/>	FYI	<input checked="" type="checkbox"/>
20 - (HRADMN) HR Administration	<input type="text"/>	Approve	<input checked="" type="checkbox"/>
20 - (BENEFIT) OSU Benefits	<input type="text"/>	FYI	<input checked="" type="checkbox"/>
40 - (COLDIV) College Division	<input type="text"/>	Approve	<input checked="" type="checkbox"/>
70 - (BENFTEC) Benefits Technical	<input type="text"/>	FYI	<input checked="" type="checkbox"/>
80 - (PAYROL) Payroll	<input type="text"/>	Approve	<input checked="" type="checkbox"/>
90 - (APPLY) EPAF Applicants	<input type="text"/>	Apply	<input checked="" type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>

Select the Approval Category again and click Go. This should re-populate your routing queue with the mandatory levels required for this EPAF, and you can continue setting up your default routing queue for this category.