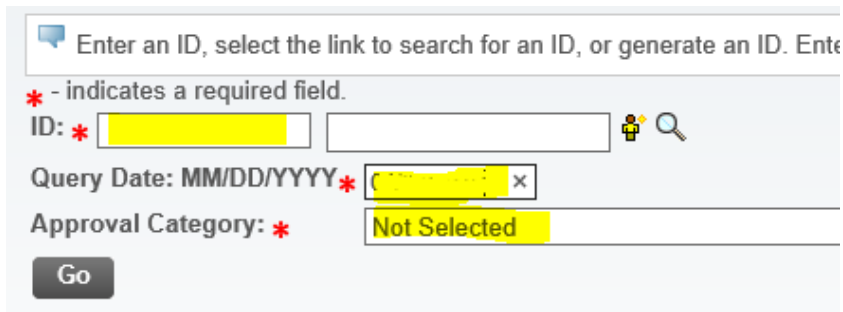


Summer EPAF Help Guide

The following guide applies to all summer EPAF templates (SS1107, SS2107 and SSM107). MTH107 information is located at the end of the guide.

New EPAF Person Selection



The screenshot shows a web form titled "New EPAF Person Selection". At the top, there is a blue speech bubble icon and the text "Enter an ID, select the link to search for an ID, or generate an ID. Enter". Below this, a red asterisk is followed by the text "- indicates a required field." The form contains three main input fields: "ID: *" with a yellow input box and a magnifying glass icon; "Query Date: MM/DD/YYYY *" with a yellow input box and a close button (x); and "Approval Category: *" with a dropdown menu showing "Not Selected". A "Go" button is located at the bottom left of the form.

1. Enter the person's ID number
2. Enter the Query Date that aligns with the EPAF Pay Schedule. For 2019 use the following dates:
 - SS1 & SS 05/05/2019
 - SS2 06/16/2019
3. Select the Approval Category for the appropriate session
 - Summer 1, SS1107
 - Summer 2, SS2107
 - Summer Full Semester, SSM107
 - Use MTH 107 when EPAF is entered late or for dates other than standard summer sessions. See additional information at the end of this document.

New EPAF Job Selection

Job Information - SalariedNBAJOBS, JBSAL3

Search	Type	Position	Suffix	Title
	New Job			
	Primary	103820	00	HR Inform Specialist and Supv

- Enter the appropriate summer position number.
 - Faculty - Refer to the Summer Position Number Chart for the appropriate number.
 - Professional/Exempt – Use a TM position number. Refer to the [Position Numbers with FOAP](#) report.
- Use a Suffix of 00 (unless the payment overlaps dates with another payment using the same position number)

Electronic Personnel Action Form

Job Information - SalariedNBAJOBS, 798554-00 First Summer Teaching

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		
PAF Effective Date: MM/DD/YYYY * (Not Enterable)		
Personnel Date: MM/DD/YYYY * (Not Enterable)		
Job Type (P, S, O): *		Secondary
Employee Type/Class:		F6
FTE:		
Step: (Not Enterable)		0
Annual Salary: * (Not Enterable)		0
Shift: (Not Enterable)		1
Job Status: * (Not Enterable)		A
Job Change Reason: * (Not Enterable)		SUMMR
Factor: * (Not Enterable)		
Number of Pays: * (Not Enterable)		
Supervisor ID:		

Credit Hour Load and Labor FTE Chart

Credit Hour Load	Labor FTE
1	.08
2	.17
3	.25
4	.33
5	.42
6	.50
7	.58
8	.67
9	.75
10	.83
11	.92
12	1.0

- Do not enter Job Begin Date at this time. If an error is received after saving, enter the same date as PAF Effective Date.
- Employee Type/Class will be F6 if faculty, TM if professional.
- Enter FTE for all Faculty summer assignments. Non-faculty only need FTE if they are part-time in their main position.

Earnings Section

Add Additional Earnings to Existing Job, 798554-00 First Summer Teaching

Current						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
New Value						
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY
	Not Selected				1	

9. Effective Date – use the same date as the PAF Effective Date above

10. Select the appropriate earning code. Commonly used summer earnings codes include:

- 365 Summer Classroom Pay: faculty teaching a fully enrolled class, use negotiated contract pay if the class is under enrolled
- 062 Negotiated Contract Class Pay: use to increase teaching load, but not to exceed 12 credit hours for the semester
- 270 NonLoad Bearing Inst Activity: non-load bearing instructional activities may occur across department lines, in a separate or remote location and in addition to regular departmental load

11. Enter Hours or Units Per Pay as 1

12. Calculate and enter Special Rate (include up to 6 digits after the decimal)

- SS1 & SS2 = total amount ÷ 3
- Full summer = total amount ÷ 6

13. Enter the End Date that aligns with the EPAF Pay Schedule. For summer 2019 use the following:

- SS1 06/16/2019
- SS 07/28/2019
- SS2 07/28/2019

14. Multiple earning lines can be used on the same EPAF within the same session and for the same position number. An example follows.

Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY
06/16/2019	365, Summer Classroom Pay	1		\$2,500.000000	1	07/28/2019
06/16/2019	062, Negotiated Contract Class Pay	1		\$774.000000	1	07/28/2019

Example of multiple earnings codes and special rate calculation:

ACC 201.01 (CRN 12345) 3 credit hours; 13 students; 7.5% x \$50,000= \$3,750 – Summer Classroom Pay
 ACC 201.02 (CRN 67890) 3 credit hours; 15 students; 7.5% x \$50,000 = \$3,750 – Summer Classroom Pay.
 ACC 369.01 (CRN 98765) 3 credit hours; 3 students; \$2,322 per chart – Negotiated Contract Class Pay

Earning Code	Total Pay by Earn Code	Special Rate
365 Summer Classroom Pay	\$7,500.00	÷3 = \$2,500.000000
062 Negotiated Contract Class Pay	\$2,322.00	÷3 = \$774.000000
Total Pay for EPAF:	\$9,822.00	↑÷6 if full summer

Calculation formula: AY salary base x .30 x number of credit hours/12 = pay / number of pay periods

e.g \$100,000 x .30 x 3 credit hours / 12 = \$7500 / 3 pay = \$2500

or use the **Pay Scale Summer 2019 Template** (Excel file)

Labor Distribution and End Section

Labor Distribution, 798554-00 First Summer Teaching

Current											
Effective Date: 04/04/2019											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
New											
Effective Date: MM/DD/YYYY											
Q	1	Q	100100	Q	900030	Q	640020	Q	2001		100.00
Q		Q		Q		Q		Q			
Q		Q		Q		Q		Q			
Q		Q		Q		Q		Q			
Q		Q		Q		Q		Q			
Q		Q		Q		Q		Q			
										Total:	100.00

Default from Index Save and Add New Rows

End a job assignment, 798554-00 First Summer Teaching

Item	Current Value	New Value
PAF Effective Date: MM/DD/YYYY(Not Enterable)		04/04/2019
Personnel Date: MM/DD/YYYY(Not Enterable)		04/04/2019
Job Change Reason: (Not Enterable)		ENDJB
Job Status: (Not Enterable)		T

15. The FOAP should default in correctly if you have selected the correct position for an org.

16. The “End a Job” section cannot be modified. Dates will default in based on the session.

Approvers

17. Add department and college approvers per your department’s approver chain. Typically, Chair, Dean and Budget Director.

18. Other levels to potentially include:

- 400 (SEE) Div Online Distance Education – include only if DOSL is paying part or all
- 650 Pre-approval HR (select Heather Bright)
- 676 Provost Budget (set to FYI)
- 700 Provost
- 730 Employee Relations – include only if the EPAF is for a Professional employee.
An [Addendum to Employment Contract](#) is also required.
- 770 Payroll FYI (select Shana Rogers)
- 780 President – include only if the EPAF’s total pay is over \$10,000.
- 800 Human Resources (select Heather Bright)

Comments

19. Comments MUST include the following information:

- *Course name/number/section for each course being paid*
- *Credit hours per course/total credit hours*
- *Total number of students per course*
- *Pay per course, with calculations*
- *Total pay for EPAF*

Comment

Example comment: ACC 201.01 (CRN 12345) 3 credit hours; 13 students; $7.5\% \times \$50,000 = \$3,750$. ACC 201.02 (CRN 67890) 3 credit hours; 15 students; $7.5\% \times \$50,000 = \$3,750$; Negotiated Contract ACC 369.01 (CRN 98765) 3 credit hours; 3 students; \$2,322 per Schedule of Pay for Contract Classes. Total Pay = $\$3,750 + \$3,750 + \$2,322 = \$9,822$

Add “addendum in process” to advise HR when one is being routed (professional employees only). HR will obtain Provost and/or Employee Relations signature.

Credit hours (e.g. “03”) are no longer needed at the beginning of the Comment.

PAY CORRECTION PROCESS

After course enrollment is finalized, pay corrections are submitted through an additional EPAF to adjust over or under payments.

How to Stop an EPAF

In this example, final enrollment numbers show the class was cancelled and no payment should be received.

- Send an email to everyone in the original approver chain and ERPHR@bsu.edu to notify them of the EPAF cancellation and reason why. (include EPAF transaction number and payment amount)

The deadline for cancellation is one week prior to the scheduled pay date.
(e.g. A payment scheduled for 5/24/2019 can be cancelled through 5/17/2019)

Upon notification HR will:

- Stop the assignment in Banner HR
- Notify Payroll
- Add a comment to the original EPAF and cancelled it

Do not cancel the EPAF through SSB. After an EPAF has been applied (i.e. all levels have approved), it should not be modified through SSB.

Example 1: Overpayment on original SS1 EPAF. New EPAF submitted to correct on second pay of SS1.

- The original EPAF paid the course as fully enrolled, but after final numbers, it was under-enrolled. The second EPAF will correct the pay to the new amount.
- An MTH 107 must be used to provide the correction. The effective date will change.
- Use the same position number and suffix as the original EPAF.

Job Information - SalariedNBAJOBS, 798554-00 First Summer Teaching

Item	Current Value	New Value	Correction EPAF
Job Begin Date: MM/DD/YYYY			
PAF Effective Date: MM/DD/YYYY*	05/05/2019	05/19/2019	← only change
Personnel Date: MM/DD/YYYY*	05/13/2019	05/13/2019	
Job Type (P, S, O): *	Secondary	Secondary	
Employee Type/Class:	F6	F6	
FTE:	.25	.25	
Step: (Not Enterable)	0	0	
Annual Salary: *	0	0	
Shift: (Not Enterable)	1	1	
Job Status: *(Not Enterable)	A	A	
Job Change Reason: *	SUMMR, Summer Assignment	SUMMR, Summer Assignment	
Factor: *	3	3	
Number of Pays: *	3	3	
Supervisor ID:			

- PAF Effective Date: start date of the pay period the person will be paid the corrected amount (Query Date uses same date)
- Personnel Date: date that work began (e.g. first day of session)
- Employee Type/Class: F6 for Faculty, TM for Professional employees
- Factors and Number of Pays: enter original number of payments to be made

Add Additional Earnings section of Correction EPAF

The original earnings line will display on the new EPAF because the correction is within the date range of the original EPAF. If the original earnings line does not display, the position-suffix may not be the same as the original EPAF.

Opt 1 ➤ If the same earning code still applies, modify the **Effective Date** and **Special Rate** on the original line.

In this example, the SS1 course load went from two classes at \$15,000 total pay to one class at \$7500 total pay. (from \$15,000/3=\$5000 to \$7500/3=\$2500)

The corrected pay starts on 05/19/2019 (pay ID 12, the second pay of SS1).

Effective Date	ORIGINAL	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY
05/05/2019		365, Summer Classroom Pay	1		5000	1	06/16/2019

Effective Date	CORRECTION	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY
05/19/2019		365, Summer Classroom Pay	1		2500	1	06/16/2019

- Opt 2 ➤ If the earning code has changed, end the original earning line by changing the End Date and add a new line. In this example the SS1 course load went from \$7500 for a fully loaded class to an under-enrolled contracted amount of \$6192. (from $\$7500/3 = \2500 to $\$6192/3 = \2064) The earnings code will change from 365-Summer Classroom Pay to 062-Negotiated Contract Class because the class is no longer fully enrolled.

ORIGINAL							
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY	
05/05/2019	365, Summer Classroom Pay	1		2500	1	06/16/2019	

CORRECTION							
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY	
05/05/2019	365, Summer Classroom Pay	1		2500	1	05/19/2019	
05/19/2019	062, Negotiated Contract Class Pay	1		2064	1	06/16/2019	

IMPORTANT: Change the End Date on the original earning code so it stops paying. DO NOT DELETE THE ORIGINAL LINE OR CHANGE THE EARNING CODE SELECTION (e.g. 365 Summer Classroom Pay). Only the Special Rate and End Date may be altered on the original line.

Correct the End Date on the original earning code line to the end of the pay period + 1 day. Do not delete the line – deleting it will not remove it from their pay record.

- Enter a new line for the new earning code and pay amount.
 - The Effective Date is the start date of the pay period the person will be paid the corrected amount. (same date as PAF Effective Date and Query Date)
 - Special Rate: The corrected amount to receive each pay period based on the new calculation.
 - Additional Earnings End Date: End of the final pay period + 1 day

Comments

The EPAF Comments should indicate the correction being made.

e.g. Overpayment -- Original EPAF 123456 submitted for \$xxx total pay. Corrected amount is \$xxx total pay based on enrollment <insert calculation>. Employee to repay \$xxx.xx (original special rate \$xxx.xx less corrected special rate \$xxx.xx = amount of repay \$xxx.xx).

- The “repay” note will indicate to Payroll that they need to work with the person to correct the overpayment.

Comment

Example 2: Underpayment on original SS1 EPAF. New EPAF submitted to correct on second pay of SS1.

- The original EPAF underpaid the course load. The second EPAF will correct the pay to the new amount.
- An MTH 107 must be used to provide the correction. The effective date will change.
- Use the same position number and suffix as the original EPAF.

Job Information - SalariedNBAJOBS, 798554-00 First Summer Teaching

Item	Current Value	New Value	Correction EPAF
Job Begin Date: MM/DD/YYYY			
PAF Effective Date: MM/DD/YYYY*	05/05/2019	05/19/2019	← only change
Personnel Date: MM/DD/YYYY*	05/13/2019	05/13/2019	
Job Type (P, S, O): *	Secondary	Secondary	
Employee Type/Class:	F6	F6	
FTE:	.25	.25	
Step: (Not Enterable)	0	0	
Annual Salary: *	0	0	
Shift: (Not Enterable)	1	1	
Job Status: *(Not Enterable)	A	A	
Job Change Reason: *	SUMMR, Summer Assignment	SUMMR, Summer Assignment	
Factor: *	3	3	
Number of Pays: *	3	3	
Supervisor ID:			

- PAF Effective Date: beginning of pay period when new pay will be received (Query Date uses same date)
- Personnel Date: date that work began (e.g. first day of session)
- Employee Type/Class: F6 for Faculty, TM for Professional employees
- Factors and Number of Pays: enter original number of payments to be made

Add Additional Earnings section of Correction EPAF

The original earnings line will display on the new EPAF because the correction is within the date range of the original EPAF. If the original earnings line does not display, the position-suffix may not be the same as the original EPAF.

Opt 1 ➤ If the same earning code still applies, modify the **Effective Date** and **Special Rate** on the original line.

In this example, one credit hour was added to change the SS1 fully loaded total pay from \$5000 to \$7500. (from $\$5000/3 = \1666.666667 to $\$7500/3 = \2500)

The corrected pay and retro pay start on 05/19/2019 (pay ID 12, the second pay of SS1).

The retro pay is the amount underpaid. ($\$2500 - 1666.666667 = \833.333333)

Effect	ORIGINAL	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD
05/05/2019		365, Summer Classroom Pay	1		1666.666667	1	06/16/2019

Effect	CORRECTION	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD
05/19/2019		365, Summer Classroom Pay	1		2500	1	06/16/2019
05/19/2019		400, Retroactive Pay	1		833.333333	1	06/02/2019

IMPORTANT: Retro pay is paid for one pay period only. Enter the End Date as 2 weeks after the effective date – Sunday to Sunday)

Opt 2 ➤ If the earning code has changed, end the original earning line by changing the End Date and add a new line. In this example, the SS1 course load went from under-enrolled contracted amount of \$6192 to a fully loaded class at \$7500. (from $\$6192/3 = \2064 to $\$7500/3 = \2500) The earnings code will change from 062-Negotiated Contract Class to 365-Summer Classroom Pay because the class is now fully enrolled. The retro pay Special Rate is the amount underpaid. ($\$2500 - 2064 = \436)

ORIGINAL							
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD	
05/05/2019	062, Negotiated Contract Class Pay	1		2064	1	06/16/2019	

CORRECTION							
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD	
05/05/2019	062, Negotiated Contract Class Pay	1		2064	1	05/19/2019	
05/19/2019	365, Summer Classroom Pay	1		2500	1	06/16/2019	
05/19/2019	400, Retroactive Pay	1		436	1	05/19/2019	

IMPORTANT: Change the End Date on the original earning code if it should no longer pay. DO NOT DELETE THE ORIGINAL LINE OR CHANGE THE EARNING CODE SELECTION (e.g. 365 Summer Classroom Pay). Only the Special Rate and End Date may be altered on the original line.

- Correct the End Date on the original earning code line to the end of the pay period + 1 day. Do not delete the line – deleting it will not remove it from their pay record.
- Enter a new line for the new earning code and pay amount.
 - The Effective Date is the start date of the pay period the person will be paid the corrected amount. (same date as PAF Effective Date and Query Date)
 - Special Rate: The corrected amount to receive each pay period based on the new calculation.
 - Additional Earnings End Date: End of the final pay period + 1 day
- Enter a new line for the retro pay earning code and retro pay amount.
 - The Effective Date is the start date of the pay period the person will be paid the corrected amount. (same date as PAF Effective Date and Query Date)
 - Special Rate: The amount underpaid/retro pay due to the person.
 - Retro End Date: 2 weeks after the effective date – Sunday to Sunday.

Comments

The EPAF Comments should indicate the correction being made.

e.g. Underpayment -- Original EPAF 123456 submitted for \$xxx total pay. Corrected amount is \$xxx total pay based on enrollment <insert calculation>. Employee is due retro amount of \$xxx.xx. (corrected special rate \$xxx.xx less original special rate \$xxx.xx = amount of retro \$xxx.xx)

Comment