The correct QUERY DATE is important on this EPAF!

MTH 107 uses: Academic and non-academic additional/supplemental earnings (secondary assignment). Examples of secondary assignments include, but are not limited to, summer teaching and miscellaneous assignments, overloads, additional classes, grant work, rapid growth/half semester courses, retirees returning to work a temporary assignment, and a returning employee whose only assignments is a temporary assignment (TF or TM).

MTH 107 Instruction information

> Red text is instructional information. This material will assist you in entering correct information in required fields.
> Green text is tips and informational, some of which is more important than other portions. This text will help you understand why certain criteria is required / needed.
> Text that is highlighted is of stressed importance. You will want to pay careful attention to this information.
> Underlined text in blue font is a hyperlink. When you click on a hyperlink, it will navigate you throughout these instructions and will also open other informative documents.

Which MTH 107 form to use:

> Fall Mth 107 – Fall semester secondary teaching assignment for a faculty or professional employee.
> Spring Mth 107 – Spring semester secondary teaching assignment for a faculty or professional employee.
> MTH 107 – Secondary assignment for a professional or faculty employee.
> MTH 107 – Primary position for a Temporary Monthly (TM) or Temporary Faculty (TF) employee.
> MTH 107 – Summer miscellaneous assignment for a faculty or professional employee. Use for assignments OUTSIDE of summer session dates (Summer Pre-Term; Summer Extended Term; and Summer Miscellaneous assignments).
> Summer 1 SS1107 – First summer term assignment for a faculty or professional employee.
> Summer 2 SS 2107 – Second summer term assignment for a faculty or professional employee.
> Summer Full SSM107 – Full summer semester term assignment for a faculty or professional employee.
    - Click here to access step-by-step guides for summer term EPAFs).

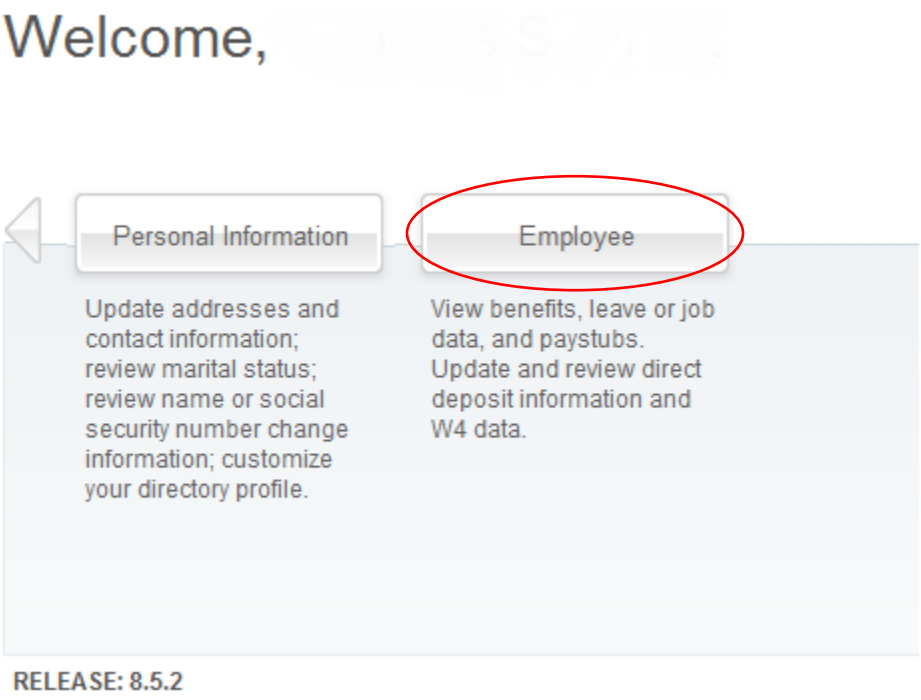
Position numbers to use:

> For fall and spring semester and/or miscellaneous assignments:
    - If the secondary assignment is not closely related to the employee's primary position, you should use a miscellaneous position number. Miscellaneous position numbers begin with "7".
    - If the secondary assignment is closely related to the employee's primary position, you may use the employee's primary position number **with a suffix other than 00**.
> For summer miscellaneous assignments:
    - Use designated summer position numbers. They begin with "7" and have summer in the title, but are not the summer term specific position numbers.
> For summer term assignments:
    - Use designated summer positions numbers for corresponding terms. They begin with "7" and will have the titles of First Summer, Second Summer or Summer Semester.
> If you need further assistance with choosing a position number, please click here to view the "Position Number Guidance" document.

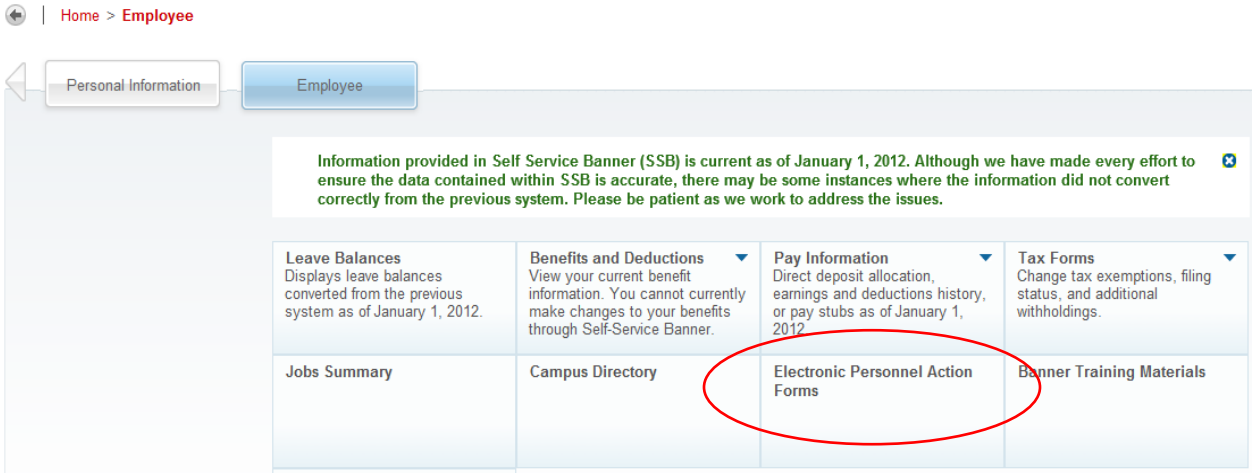
Before you begin this EPAF, please be sure you have the following information:

- The beginning and ending assignment dates.
- The position number and suffix for assignment.
- The BSU ID number of the employee and the supervisor.
- The payment amount.
- Number of Pays/Factors (if applicable).
- The reason you are doing the EPAF (such as: SECJB – Secondary Job; SUMMR – Summer Assignment).
- The names of approvers that will be included.

Login to Self-Service Banner (SSB) and then click the "Employee" tab as shown below.



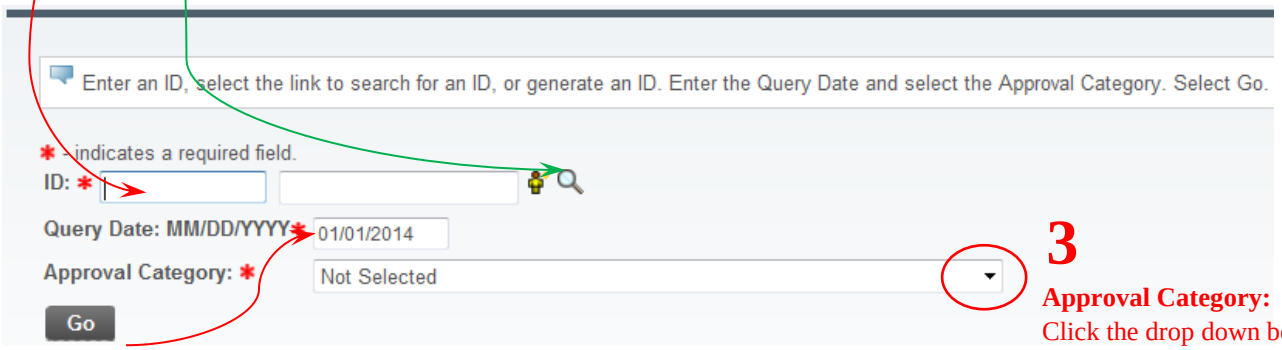
Click on the "Electronic Personnel Action Form" (EPAF) box, shown below.



Click on the “New EPAF” link, highlighted below.

The page and fields below should appear.

1 **ID:** Enter the employee’s BSU ID in the “ID” box shown below.
Or you can search for the employee’s BSU ID by clicking on the magnifying glass symbol.

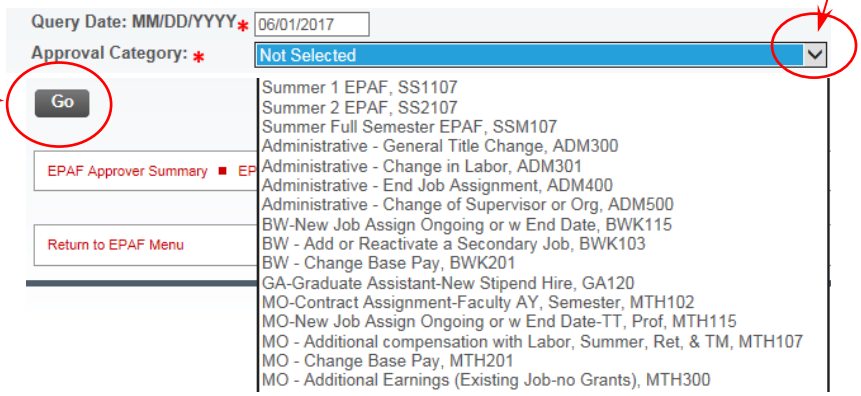


2 **Query Date:** Important! The “Query Date” box **must** be the first day of the month that you want the EPAF to be effective. For example, if you want the assignment to be paid beginning January 31, then the query date **must** be January 1, if you want the EPAF to be paid beginning Feb 28/29, the query date must be February 1, etc.

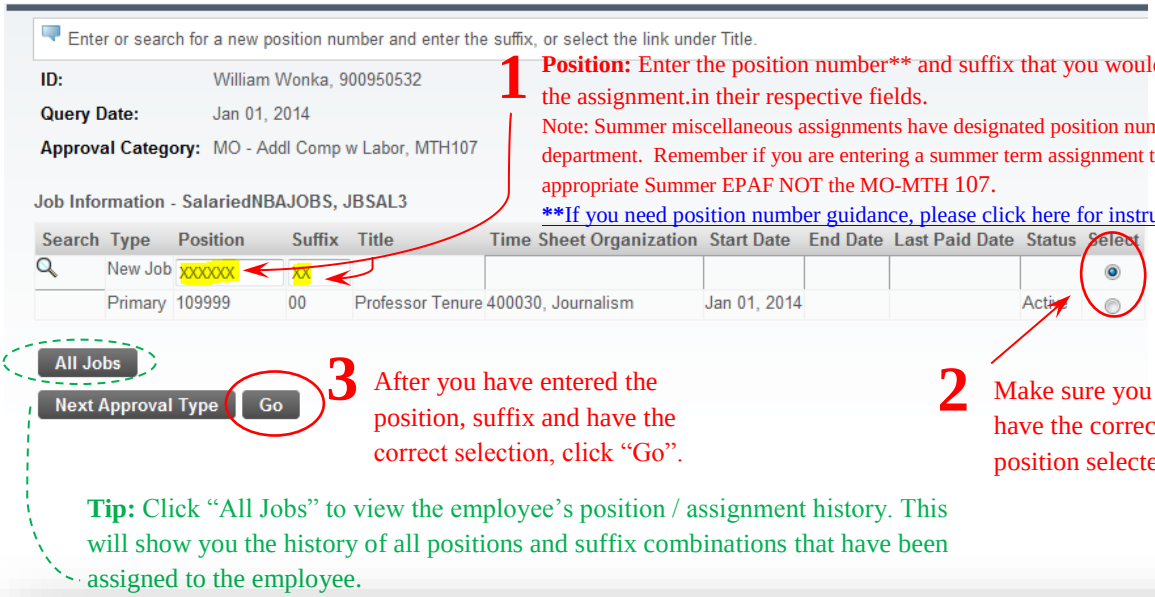
Tip: Remember the Query Date. It will be useful/required in later steps.

3 **Approval Category:** Click the drop down box and select the appropriate approval category.

4 After you have selected the appropriate approval category, entered the employee ID and query date, click “Go”.

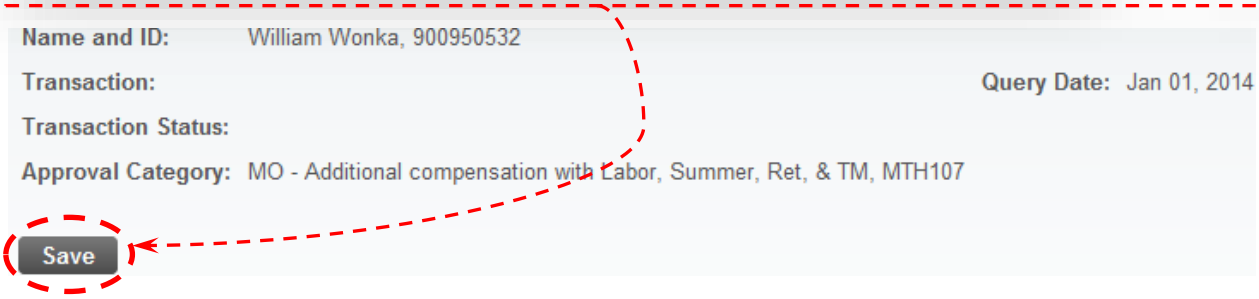


After you select "Go", the information and screen below should populate. The employee name, ID, Query Date and Approval Category should populate from the previous step. Below the employee information, is the employee's primary position (if applicable), current and previous position history.



Tip: Click "All Jobs" to view the employee's position / assignment history. This will show you the history of all positions and suffix combinations that have been assigned to the employee.

Once you select go, you will be routed to the EPAF. Before you begin entering information into the EPAF, click the "Save" button. This action, if the position number and suffix combination have been previously used, will populate the current values into the respective fields. This is important for future steps in the EPAF.



For further instruction, please click one of the following links:

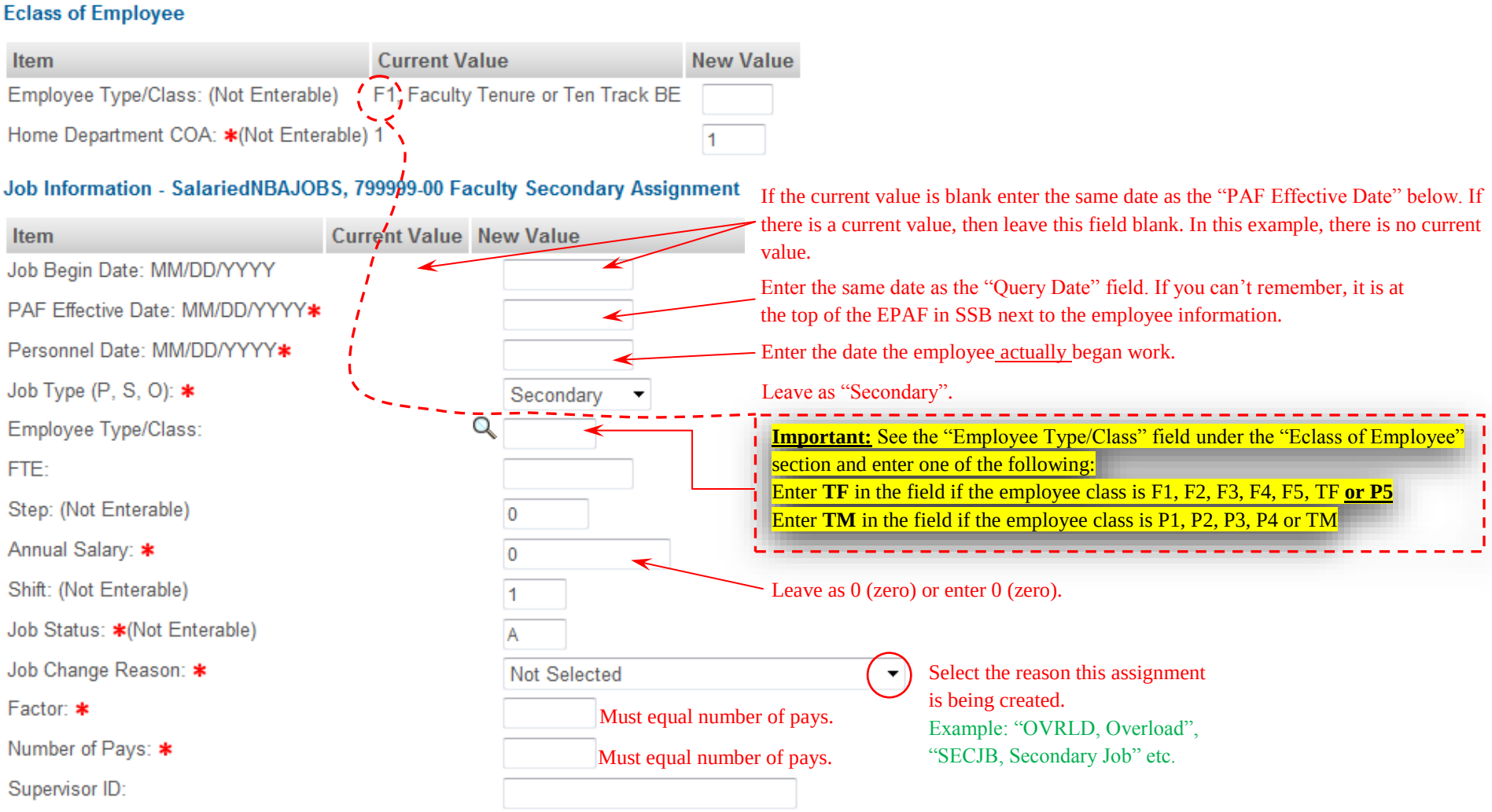
> If this is a secondary assignment for a faculty or professional employee, please click here (or see pages 5-9)

> If this is a summer miscellaneous assignment for a faculty or professional employee, please click here (or see pages 10-14).

> If this is a summer term teaching assignment for a faculty or professional employee, please click here to access step by step Summer EPAF guides.

> If this is a primary position for a temporary professional or temporary faculty, please click here. (or see pages 15-19)

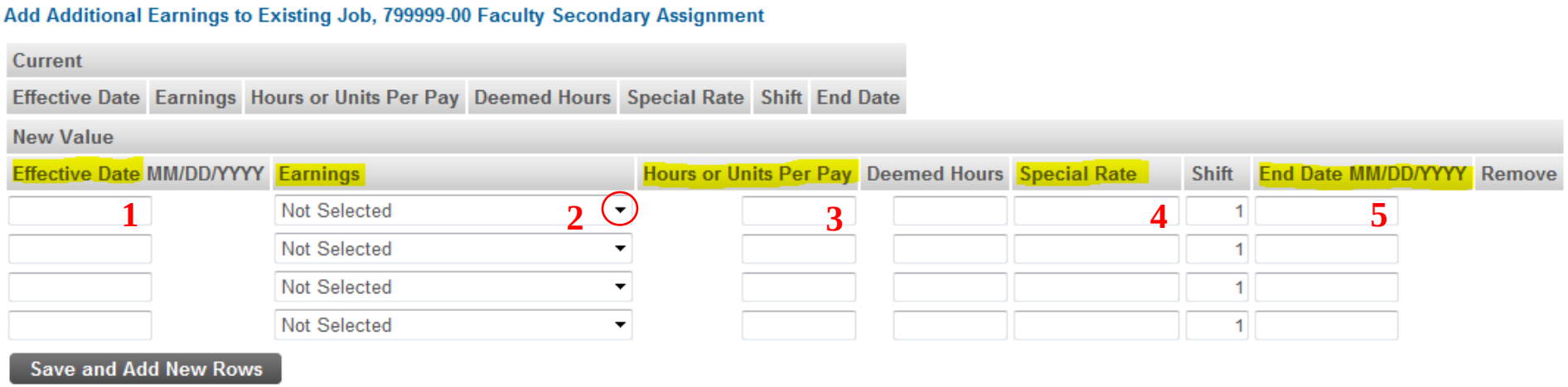
Enter the position information under "Job Information – SalariedNBAJOBS…" in the "New Value" fields, shown below. If the position and suffix combo have been previously assigned to the employee, the information for that position will populate under "Current Value".



Continue to "Add Additional Earnings to Existing Job" section.

Next, add the additional earnings information.

1-Effective Date: Enter the same date as the "Query Date" and "PAF Effective Date" fields from the previous steps.
2-Earnings: Click the drop down box and select the appropriate earnings code. If you do not know which earnings code to use, please contact your SuperAdmin, College Budget Director or Human Resources.
3-Hours or Units Per Pay: Must be 1 (one).
4-Special Rate: Enter the amount the employee is to be paid per pay period (monthly). To get this amount, divide the total contract amount by the number of months over which it is to be paid. For example, if the total contract amount is $3,000 and the work is from Jan 1 – March 31, divide $3,000 by 3 months = $1,000.
5-End Date: Enter the first day of the month for the month after the final assignment payment. For example if the final payment for the contract is March 31st, enter April 1st in the "End Date" field. If the final payment is December 31st enter January 1st, etc.



Tip: Remember to click "Save" after you enter new information as well as periodically to ensure that your work is saved and not lost.

Continue to the "End a job assignment" and "Labor Distribution" sections.

Shown below is the "Labor Distribution" and "End a job assignment" sections.

Highlighted below is the account number and employee class. Ensure that the account number matches the correct employee class from "Eclass of Employee" section of the EPAF.

Eclass of Employee

Item	Current Value	New Value
Employee Type/Class: (Not Enterable)	F1, Faculty Tenure or Ten Track BE	

Employee Class(es)	Account No.	Employee Class(es)	Account No.
F1	610040	P1 (Reg Professional)	610010
F2, F3, F4, F5	620010	P2, P3, P4	630010
P1 (Dept Chair only)	610020	P5	610030

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
1		100100	400030	610040	2001					100.00
									Total:	100.00

The labor distribution should already be populated; and if you have selected the correct position number, the salary assignment should be charged to the correct department Fund, Organization, Account and Program (FOAP). However, it doesn't hurt to spot check the information to ensure that it is correct. Also, you can change the FOAP information to pay from another department FOAP, but only do this if you have been instructed to do so. For more information, contact your College Budget Director.

To end the job assignment, follow the highlighted instructions.

End a job assignment, 799999-00 Faculty Secondary Assignment

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

Enter the last day of the month, you wish to end the assignment. For example, if the work is completed in May, enter May 31st, if it ends in December, enter December 31st etc.

Enter the date the employee actually completed work.

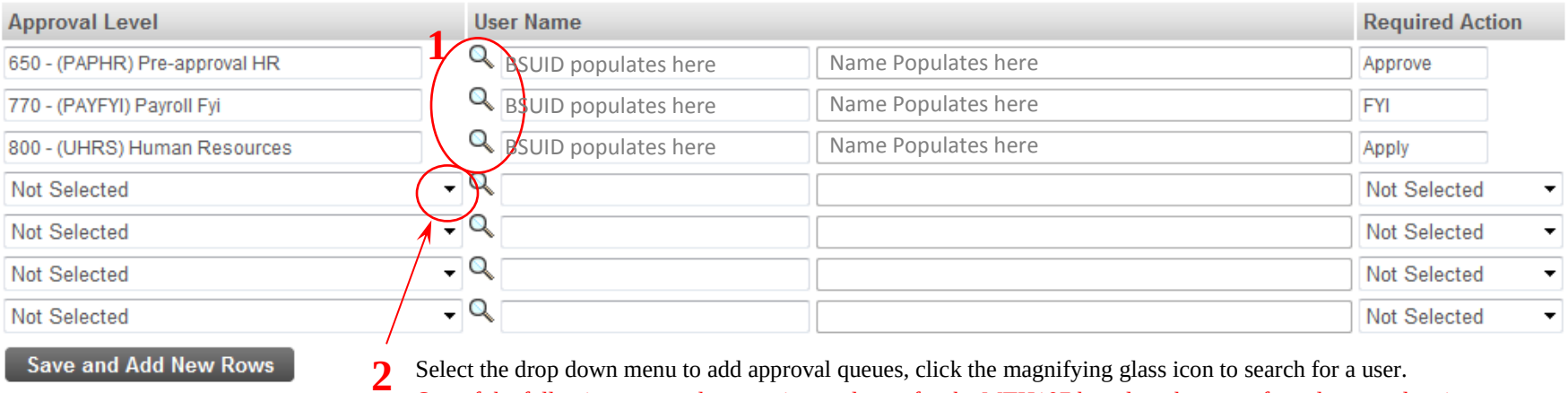
Continue to the "Routing Queue" and final section.

Enter the "Routing Queue" information to ensure your EPAF is approved and applied correctly.

If you have not setup your default routing queues for the required approval levels, (click here for instructions) you will need to add them manually.

STEP 1-Click the magnifying glass icon (1-circled below) to search for a user.
For MO Approval Category EPAF's for Contract Faculty and Professional Staff ONLY enter the 650 – Pre-approval HR and 800 – Human Resources approval queues as follows:
650 – Pre-Approval HR - select Heather Bright.
770 – Payroll FYI - select Shana Rogers.
800 – Human Resources – select Heather Bright.

Routing Queue



Select the drop down menu to add approval queues, click the magnifying glass icon to search for a user.
One of the following approval queues is mandatory for the MTH107 based on the type of employee and assignment:
For faculty and Dept. Chairs, you must add 700 – Provost
For professional employees, you must add 730 – University Compliance
NOTE: If the total contract amount is less than $5,000 DO NOT add the 780 – President approval level. Only if the total contract amount exceeds $5,000 (Example: $5,000.01 or higher) would you then add 780 – President.
For more information on other required approval queues in your area please contact your college budget director or department head.

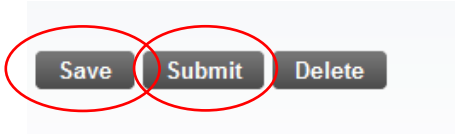
Please continue to the comment section and final steps.

Please add comments to your EPAF.

Comment

Please add detailed comments, including total payment amount, payment calculations, actual working dates, credit hours if applicable, whether or not an addendum has been generated, etc.

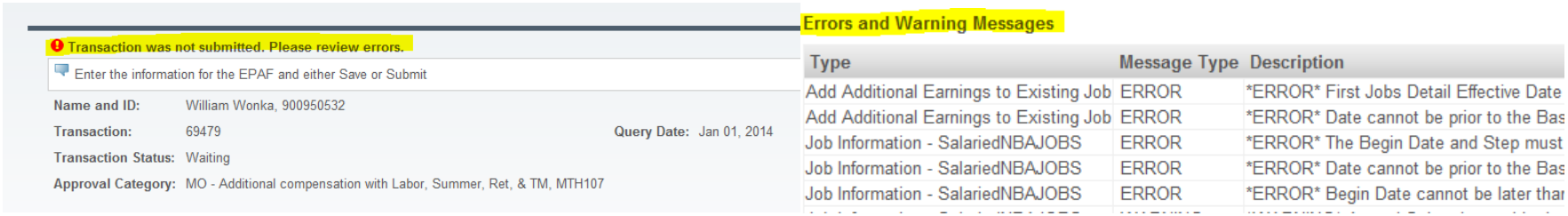
Final Step



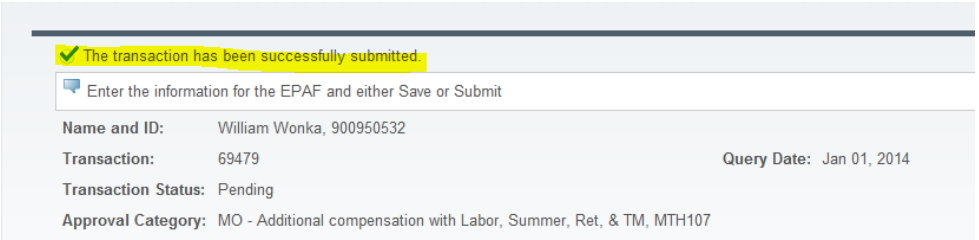
Always save the EPAF before submitting, if you do not save, the data you have entered into the fields since you last saved, will be lost. This can be done at the top or bottom of the EPAF page.

After you save and submit, please review your EPAF to ensure it was submitted successfully.

Below is an example of an EPAF that failed to submit. If you get this message, please review and correct the errors, save and then submit again. For a list of EPAF errors and explanations please click here.



Below is an example of a successful EPAF.



If you encounter any errors not covered by the Error Explanation Document or still have difficulty submitting your EPAF, please click here to visit the Banner User Guide section for further assistance and additional training documents. If you need further assistance, please contact your SuperAdmin. If your SuperAdmin is unavailable, please send an email to ERPHR@bsu.edu for assistance.

Enter the position information under "Job Information – SalariedNBAJOBS…" in the "New Value" fields, shown below. If the position and suffix combo has been previously assigned to the employee, the information for that position will populate under "Current Value".

Eclass of Employee

Item	Current Value	New Value
Employee Type/Class: (Not Enterable)	F1, Faculty Tenure or Ten Track BE	
Home Department COA: *(Not Enterable)	1	1

Job Information - SalariedNBAJOBS, 798733-00 Summer Semester Teaching

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

If the current value is blank then see "PAF Effective Date" below. If there is a current value, then leave this field blank. (In this example, there is no current value.)

Enter the same date as the "Query Date" field. If you can't remember, it is at the top of the EPAF in SSB next to the employee information.

Enter the date the employee actually began work.

Leave as "Secondary" (unless prompted to change to "Primary".)

Important: You **must** enter either "**F6**" into this field for faculty summer miscellaneous assignments, or "**TM**" for professional secondary assignments.

Leave as 0 (zero) or enter 0 (zero).

Select SUMMR as the Job Change Reason.

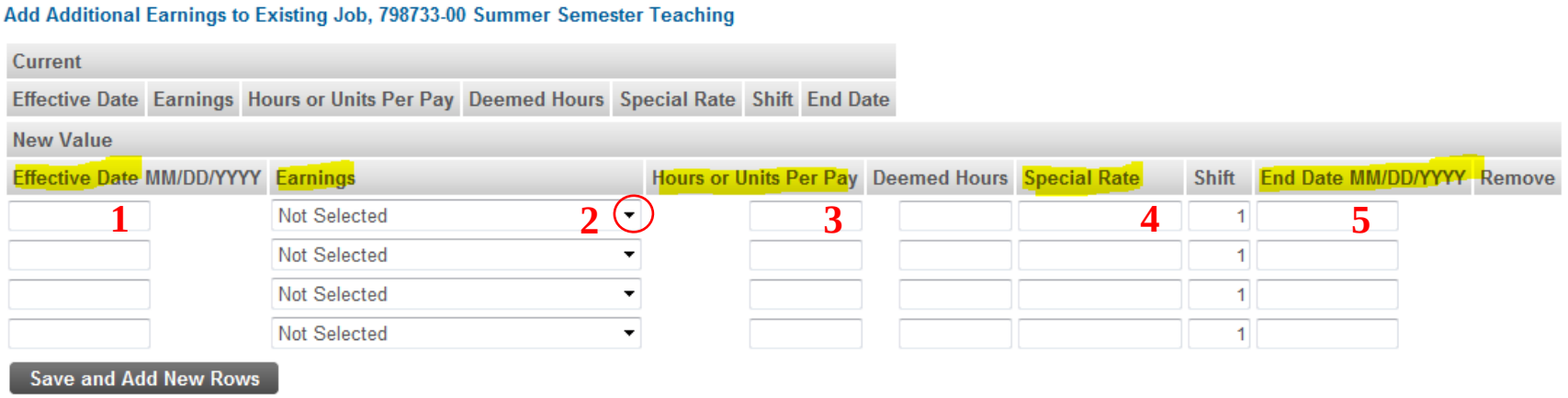
Must equal number of pays.

Must equal number of pays.

Continue to "Add Additional Earnings to Existing Job" section.

Next, add the additional earnings information.

1-Effective Date: Enter the same date as the "Query Date" and "PAF Effective Date" fields from the previous steps.
2-Earnings: Click the drop down box and select the appropriate earnings code. If you do not know which earnings code to use, please contact your SuperAdmin, College Budget Director or Human Resources.
3-Hours or Units Per Pay: Must be 1 (one).
4-Special Rate: Enter the amount the employee is to be paid per pay period. To get this amount, divide the total contract amount by the number of months over which it is to be paid. For example, if the total contract amount is $5,000 and the work is from June to July, divide $5,000 by 2 months = $2,500.
5-End Date: Enter the first day of the month for the month after the final assignment payment. For example if the final payment for the contract is June 30th, enter July 1st in the "End Date" field. If the final payment is July 31st enter August 1st etc.



Tip: Remember to click "Save" after you enter new information as well as periodically to ensure that your work is saved and not lost.

Continue to the "Labor Distribution", "End a job assignment" and "Labor Distribution" sections.

MTH107 – Summer Miscellaneous Assignment for Faculty and Professional
(for assignment dates that are different than summer semester term dates)

Shown below is the "Labor Distribution" and "End a job assignment" sections.

Highlighted below is the account number field. Ensure that the account number matches the correct summer term account code.

Summer Term	Account No.	Summer Term	Account No.
Full, Summer	640010	Extended Term	640010
1st, Summer	640020	Pre-Term	640020
2nd, Summer	640030		

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
1		100100	400030		2001					100.00
									Total:	100.00

The labor distribution should already be populated; and if you have selected the correct position number, the salary assignment should be charged to the correct department Fund, Organization, Account and Program (FOAP). However, it doesn't hurt to spot check the information to ensure that it is correct. Also, you can change the FOAP information to pay from another department FOAP, but only do this if you have been instructed to do so. For more information, contact your College Budget Director.

To end the job assignment, follow the highlighted instructions.

End a job assignment, 798733-00 Summer Semester Teaching

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

Enter the last day of the month, you wish to end the assignment. For example, if the work is completed in June, enter June 30th, if it ends in July, enter July 31st etc.

Enter the date the employee actually completed work.

Continue to the "Routing Queue" section.

Enter the "Routing Queue" information to ensure your EPAF is approved and applied correctly.

If you have not setup your default routing queues for the required approval levels, (click here for instructions) you will need to add them manually.

STEP 1-Click the magnifying glass icon (1-circled below) to search for a user.
For MO Approval Category EPAF's for Contract Faculty and Professional Staff ONLY enter the 650 – Pre-approval HR and 800 – Human Resources approval queues as follows:
650 – Pre-Approval HR - select Heather Bright.
770 – Payroll FYI - select Shana Rogers.
800 – Human Resources – select Heather Bright.

Routing Queue

Approval Level	User Name		Required Action
650 - (PAPHR) Pre-approval HR	BSUID populates here	Name Populates here	Approve
770 - (PAYFYI) Payroll Fyi	BSUID populates here	Name Populates here	FYI
800 - (UHRS) Human Resources	BSUID populates here	Name Populates here	Apply
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected

1

Save and Add New Rows

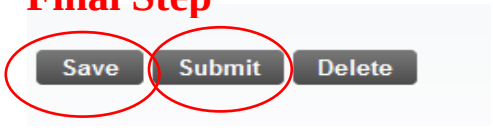
2 Select the drop down menu to add additional approval queues, click the magnifying glass icon to search for a user.
One of the following approval queues is mandatory for the MTH107 based on the type of employee and assignment:
For faculty and Dept. Chairs, you must add 700 – Provost
For professional employees, you must add 730 – University Compliance
NOTE: If the total contract amount is less than $5,000 DO NOT add the 780 – President approval level. Only if the total contract amount exceeds $5,000.00 (Example: $5,000.01 or higher) would you then add 780 – President.
For more information on other required approval queues in your area please contact your college budget director or department head.

Please continue to the comment section and final steps.

Please add comments on your EPAF.

Please add detailed comments, including total payment amount, payment calculations, actual working dates, credit hours if applicable, whether or not an addendum has been generated, etc.

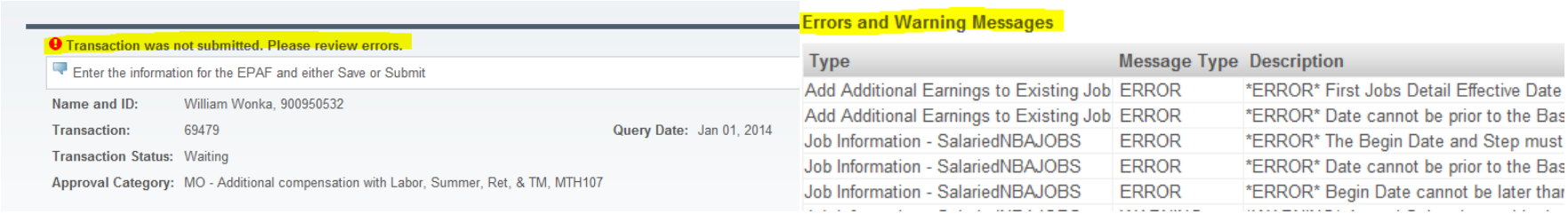
Final Step



Always save the EPAF before submitting, if you do not save, the data you have entered into the fields since you last saved, will be lost. This can be done at the top or bottom of the EPAF page.

After you save and submit, please review your EPAF to ensure it was submitted successfully.

Below is an example of an EPAF that failed to submit. If you get this message, please review and correct the errors, save and then submit again. For a list of EPAF errors and explanations please click here.


Transaction was not submitted. Please review errors.

Enter the information for the EPAF and either Save or Submit

Name and ID: William Wonka, 900950532

Transaction: 69479 Query Date: Jan 01, 2014

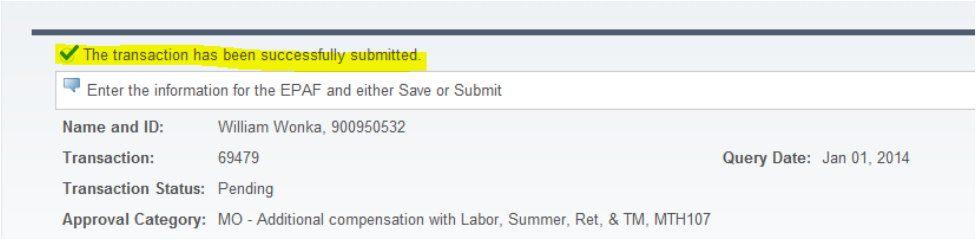
Transaction Status: Waiting

Approval Category: MO - Additional compensation with Labor, Summer, Ret, & TM, MTH107

Errors and Warning Messages

Type	Message Type	Description
Add Additional Earnings to Existing Job	ERROR	*ERROR* First Jobs Detail Effective Date
Add Additional Earnings to Existing Job	ERROR	*ERROR* Date cannot be prior to the Bas
Job Information - SalariedNBAJOBS	ERROR	*ERROR* The Begin Date and Step must
Job Information - SalariedNBAJOBS	ERROR	*ERROR* Date cannot be prior to the Bas
Job Information - SalariedNBAJOBS	ERROR	*ERROR* Begin Date cannot be later thar

Below is an example of a successful EPAF.


The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Name and ID: William Wonka, 900950532

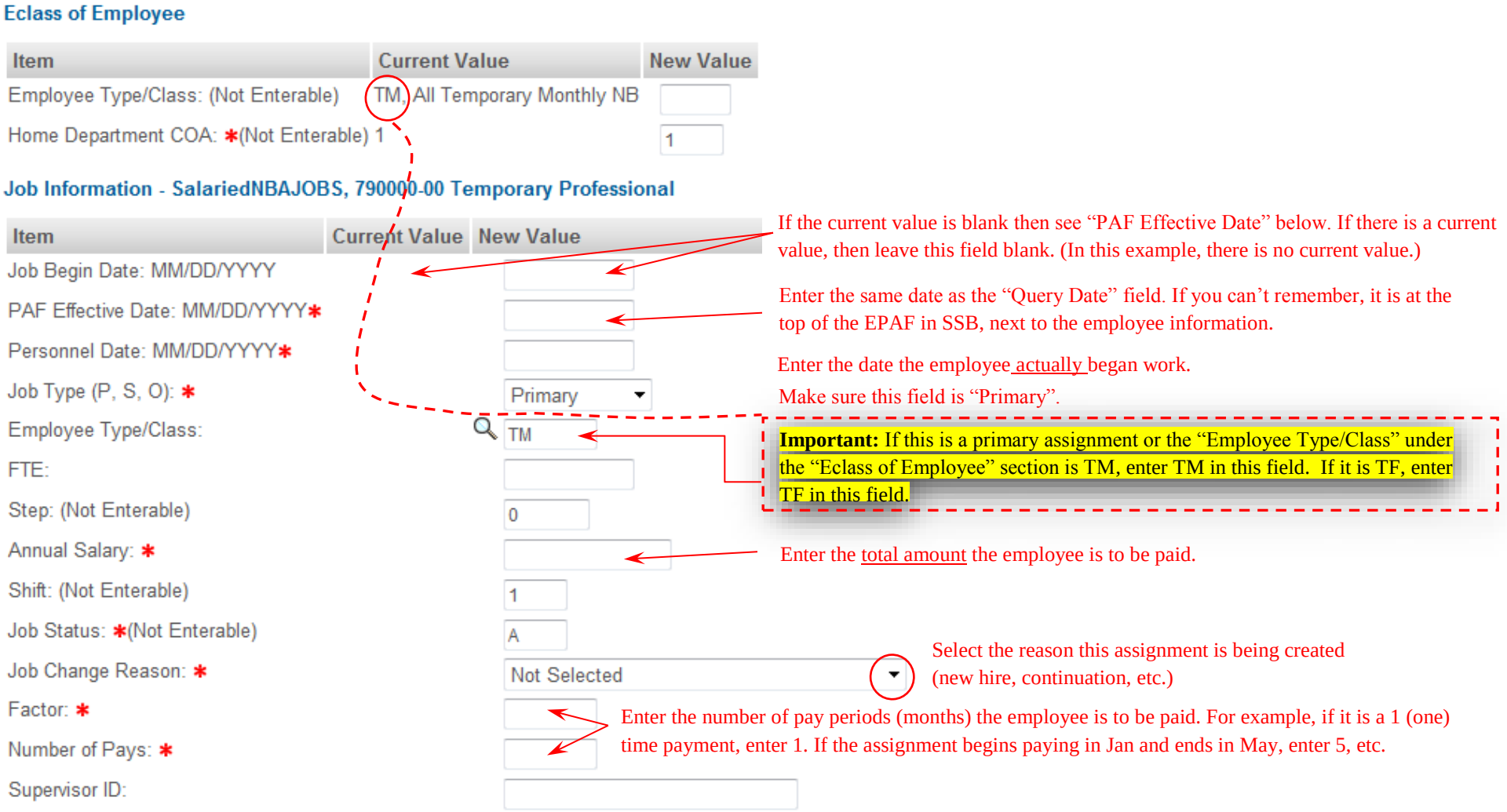
Transaction: 69479 Query Date: Jan 01, 2014

Transaction Status: Pending

Approval Category: MO - Additional compensation with Labor, Summer, Ret, & TM, MTH107

If you encounter any errors not covered by the Error Explanation Document or still have difficulty submitting your EPAF, please click here to visit the Banner User Guide section for further assistance and additional training documents. If you need further assistance, please contact your SuperAdmin. If your SuperAdmin is unavailable, please send an email to ERPHR@bsu.edu for assistance.

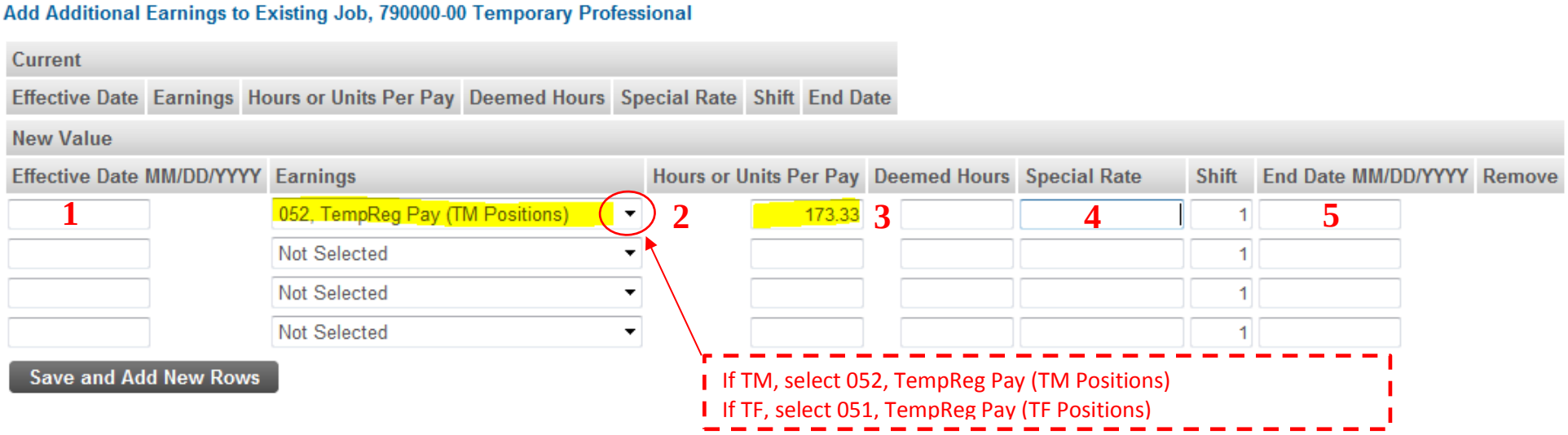
Enter the position information under "Job Information – SalariedNBAJOBS…" in the "New Value" fields, shown below. If the position and suffix combo has been previously assigned to the employee, the information for that position will populate under "Current Value".



Continue to "Add Additional Earnings to Existing Job" section.

Next, add the additional earnings information.

1-Effective Date: Enter the same date as the "Query Date" and "PAF Effective Date" fields from the previous steps.
2-Earnings: Click the drop down box and select 051, Temp Reg Pay (TF Postions) or 052, TempReg Pay (TM Positions).
3-Hours or Units Per Pay: Must be 173.33.
4-Special Rate: Leave blank.
5-End Date: Leave blank.



Tip: Remember to click "Save" after you enter new information as well as periodically to ensure that your work is saved and not lost.

Continue to the "Labor Distribution", "End a job assignment" and "Labor Distribution" sections.

Shown below is the "Labor Distribution" and "End a job assignment" sections.

Highlighted below is the account number and employee class. Ensure that the account number matches the correct employee class from "Eclass of Employee" section of the EPAF.

Eclass of Employee

Item	Current Value	New Value
Employee Type/Class: (Not Enterable)	TM, All Temporary Monthly NB	

Employee Class(es)	Account No.
TM	630010
TF	620010

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
1		100100	400030		2001					100.00
									Total:	100.00

The labor distribution should already be populated; and if you have selected the correct position number, the salary assignment should be charged to the correct department Fund, Organization, Account and Program (FOAP). However, it doesn't hurt to spot check the information to ensure that it is correct. Also, you can change the FOAP information to pay from another department FOAP, but only do this if you have been instructed to do so. For more information, contact your College Budget Director.

To end the job assignment, follow the highlighted instructions.

End a job assignment, 790000-00 Temporary Professional

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

Enter the last day of the month, you wish to end the assignment. For example, if the work is completed in May, enter May 31st, if it ends in December, enter December 31st etc.

Enter the date the employee actually completed work.

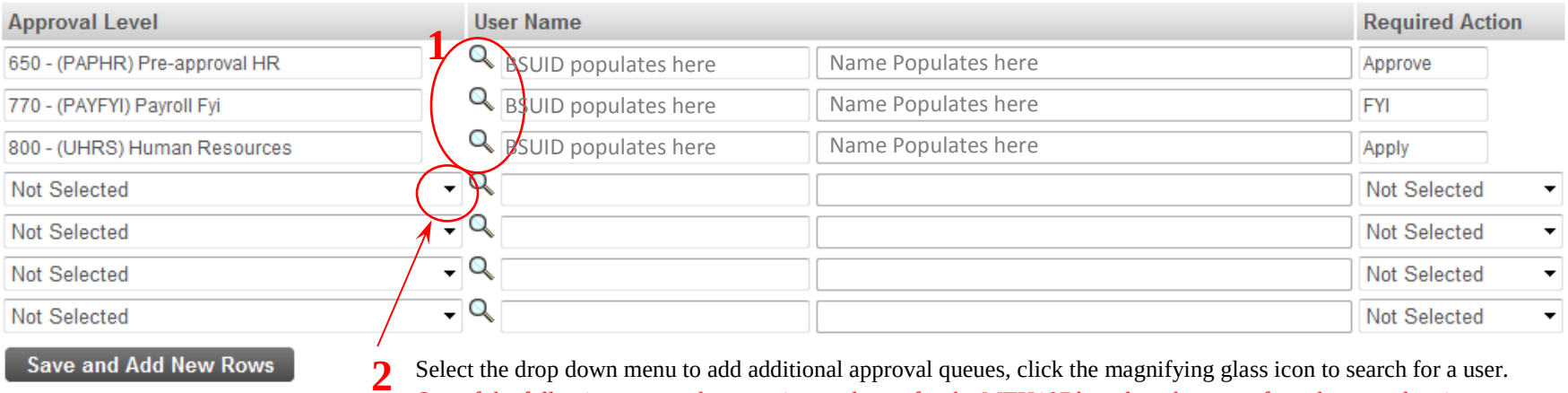
Continue to the "Routing Queue" section.

Enter the "Routing Queue" information to ensure your EPAF is approved and applied correctly.

If you have not setup your default routing queues for the required approval levels, (click here for instructions) you will need to add them manually.

STEP1-Click the magnifying glass icon (1-circled below) to search for a user.
For MO Approval Category EPAF's for Contract Faculty and Professional Staff ONLY enter the 650 – Pre-approval HR and 800 – Human Resources approval queues as follows:
650 – Pre-Approval HR - select Heather Bright.
770 – Payroll FYI - select Shana Rogers.
800 – Human Resources – select Heather Bright.

Routing Queue



Select the drop down menu to add additional approval queues, click the magnifying glass icon to search for a user.
One of the following approval queues is mandatory for the MTH107 based on the type of employee and assignment:
If it is a temporary teaching assignment, you must add 700 – Provost
For temporary employees (non-teaching), you must add 730 – University Compliance
NOTE: If the total contract amount is less than $5,000 DO NOT add the 780 – President approval level. Only if the total contract amount exceeds $5,000 (Example: $5,000.01 or higher) would you then add 780 – President.
For more information on other required approval queues in your area please contact your college budget director or department head.

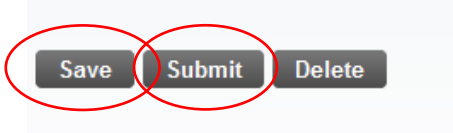
Please continue to the comment section and final steps.

Please add comments to your EPAF.

Comment

Please add detailed comments, including total payment amount, payment calculations, actual working dates, credit hours if applicable, the nature of work performed, etc.

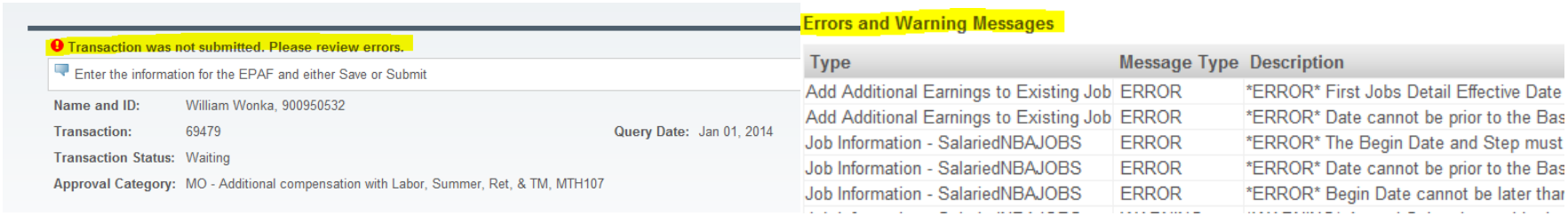
Final Step



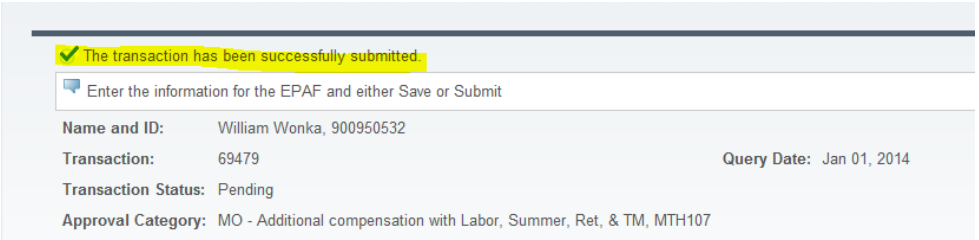
Always save the EPAF before submitting, if you do not save, the data you have entered into the fields since you last saved, will be lost. This can be done at the top or bottom of the EPAF page.

After you save and submit, please review your EPAF to ensure it was submitted successfully.

Below is an example of an EPAF that failed to submit. If you get this message, please review and correct the errors, save and then submit again. For a list of EPAF errors and explanations please click here.



Below is an example of a successful EPAF.



If you encounter any errors not covered by the Error Explanation Document or still have difficulty submitting your EPAF, please click here to visit the Banner User Guide section for further assistance and additional training documents. If you need further assistance, please contact your SuperAdmin. If your SuperAdmin is unavailable, please send an email to ERPHR@bsu.edu for assistance.