Summer EPAF Training 2017
Summer EPAFs 2017

• What we think of and are looking forward to this time of year....

• And then someone mentions summer EPAFs....
Summer EPAFs & MTH 107

What’s Changed?

- Factors and Pays – all EPAFs
  - On previous MTH 107 EPAFs, the Factors and Pays were entered as a 1 in both fields;
  - Going forward, the Factors and Pays fields should reflect the actual number of pays for the assignment.
  - The amount to be paid will still be entered in the Additional Earnings section.
Summer EPAFs & MTH 107
What’s Changed?

- **Job Change Reason Codes:**
  - Number of codes have been reduced!
  - See updated job change reason code chart with purpose of codes
  - [http://cms.bsu.edu/about/administrativeoffices/humanresources/banner-user-guide](http://cms.bsu.edu/about/administrativeoffices/humanresources/banner-user-guide)

- **Earnings Codes:**
  - Committee is currently working on clarifications of the purposes of the codes
  - 385, 270, 306
  - [http://cms.bsu.edu/about/administrativeoffices/payrolleb/payroll](http://cms.bsu.edu/about/administrativeoffices/payrolleb/payroll)
Summer EPAFs & MTH 107

What’s New?

• Three new summer EPAFs have been created!
  - SS1 107 – Summer 1
  - SS2 107 – Summer 2
  - SSM 107 – Summer Full Semester

• A new F6 E-Class has been created for summer faculty EPAFs

• Summer EPAFs were built using the same template as the MTH 107 EPAF, however dates have been entered in most fields based on the session being taught.

• Defaulted dates on the new summer EPAFs are “Not Enterable.”

• Please note – the MTH 107 EPAF is still in use for any other summer/secondary assignments that have Personnel Dates that are NOT one of the three summer session dates.
Summer EPAFs:  
Job Information Section

- **Job Begin Date**: if a date is in the Current Value field, leave New Value field blank. If the Current Value field is blank, the date in the New Value field should be 06/01/2017 for 1SS and Full Summer or 07/01/2017 for 2SS.

- **Hint**: Click on Save before entering the Job Begin Date to see if a value populates in the Current Value field.

- If the employee is professional – use a TM position number and change Employee Type Class to TM.

- **The Job Type** will default to Secondary. This will be correct in the majority of EPAFs. If you get an error indicating that the person does not have a primary job, you can then change the Job Type to Primary and follow the instructions for entering a F6 as a primary position on the Banner User Guide webpage.
Summer EPAFs: Additional Earnings to Existing Job

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Earnings</th>
<th>Hours or Units Per Pay</th>
<th>Deemed Hours</th>
<th>Special Rate</th>
<th>Shift</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer 1 – 06/01/2017</td>
<td>Not Selected</td>
<td>Not Selected</td>
<td>Not Selected</td>
<td>Not Selected</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Summer 2 – 07/01/2017</td>
<td>Not Selected</td>
<td>Not Selected</td>
<td>Not Selected</td>
<td>Not Selected</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Summer Full – 06/01/2017</td>
<td>Not Selected</td>
<td>Not Selected</td>
<td>Not Selected</td>
<td>Not Selected</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

Earnings Code: Use drop down arrow to select appropriate earnings code – more than one earnings code can be listed on the same EPAF!

Hours/Units Per Pay will be 1 on a secondary assignment.

Leave blank

On Summer 1 & Summer 2 EPAFs the Special Rate will be the total amount to be paid.

On Summer Full EPAFs, the Special Rate will be the total amount to be paid divided by 2.

Summer 1 – 07/01/2017
Summer 2 – 08/01/2017
Summer Full – 08/01/2017
### Summer EPAFs:
**Labor Distribution and End a Job Assignment**

#### Labor Distribution, 798488.00 First Summer Teaching

<table>
<thead>
<tr>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date: 06/01/2017</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>COA</th>
<th>Index</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Project</th>
<th>Cost</th>
<th>Percent</th>
<th>Encumbrance Override End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>100100</td>
<td>500030</td>
<td>840020</td>
<td>2001</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>100.00</td>
<td></td>
</tr>
</tbody>
</table>

**Total**: 100.00

- All fields in both sections will default in.
- The only editable fields will be in the Labor Distribution section, if a FOAP change is required.
- No fields are editable in the End a Job Assignment Section.
You will need to add your department and/or college level approvers per your department’s approval chain (Chair/Director, Dean, Budget Director, etc.).

- Remember to add John Burton if any of the courses are being paid for by Division of Online and Distance Education (DODE).
- For remaining approvals:
  - 650 – Pre-approval HR – Teresa Pryor
  - 700 – Provost – Marilyn Buck
  - *730 – Compliance – Kevin Kenyon – *only add Compliance on EPAFs for professional employees. An addendum will also need to be submitted.
  - 770 – Payroll FYI – Shana Rogers
  - **780 – President – Terry King – **only add President if EAPF’s total pay is OVER $5,000.00 ($5,000.01 and higher).
  - 800 – Human Resources – Teresa Pryor
Summer EPAFs: Comments

You can list more than one course and can enter more than one type of pay on the same EPAF (i.e., 365 summer classroom teaching, 062 negotiated contract class, etc.), as long as they are taught in the same session.

Example: 09; ACC 201.01 (CRN 12345) 3 credit hours; 13 students; 7.5% x $50,000 = $3,750. ACC 201.02 (CRN 67890) 3 credit hours; 15 students; 7.5% x $50,000 = $3,750; ACC 369.01 (CRN 98765) 3 credit hours; 3 students; $2,219 per chart. Total Pay = $3,750 + $3,750 + $2,219 = $9,719

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 (w/calculations if budget director requires)
- Total Pay for EPAF
Example of Multiple Earnings Codes in Additional Earnings

Example:

<table>
<thead>
<tr>
<th>Course</th>
<th>CRN</th>
<th>Hours or Units Per Pay</th>
<th>Deemed Hours</th>
<th>Special Rate</th>
<th>Shift</th>
<th>End Date MM/DD/YYYY</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACC 201.01</td>
<td>12345</td>
<td>1</td>
<td></td>
<td>750.00</td>
<td>1</td>
<td>07/01/2017</td>
</tr>
<tr>
<td>ACC 201.02</td>
<td>67890</td>
<td>1</td>
<td></td>
<td>750.00</td>
<td>1</td>
<td>07/01/2017</td>
</tr>
<tr>
<td>ACC 369.01</td>
<td>98765</td>
<td>1</td>
<td></td>
<td>2219.00</td>
<td>1</td>
<td>07/01/2017</td>
</tr>
</tbody>
</table>

Total Pay = $3,750 + $3,750 + $2,219 = $9,719

Special Rate for 365 Summer Classroom Pay = $3750 + 3750 = $7,500
Special Rate for 062 Negotiated Contract Class Pay = $2,219
Total Pay for EPAF = $9,719
Fall & Spring Semester Secondary Assignment EPAFs
Also New!

• Per your suggestions - Fall Semester and Spring Semester Secondary EPAFs have been created as well!
  - Fall Semester – Fall 107
  - Spring Semester – Spring 107

• Semester EPAFs were built using the same template as the MTH 107 EPAF, like the new summer EPAFs, dates have been entered in most fields based on the semester being taught.

• Please note – the MTH 107 EPAF is still in use for any other secondary assignments that have Personnel Dates that are NOT either the full Fall or full Spring semester.
Fall & Spring Retiree Teaching Assignments
What’s Changed?

• Retirees teaching (if taught within the past year):
  • Use TF position numbers (previously used TM numbers)
  • Job Change Reason - BGSMA – Begin semester assignment
  • Factors and Pays should each be 5
  • Earn Code - 061 X-Pay/Semester

• Retirees teaching for the first time after retirement – contact your HR Rep
EPAF Deadline Dates

EPAFs need to be in the Pre-Approval HR queue by the 9th of each month unless the 9th falls on the weekend and then they are due the following Monday. See dates below:

- April        April 10, 2017
- May          May 9, 2017
- June         June 9, 2017
- July         July 10, 2017
- August       August 9, 2017
- September    September 10, 2017
- October      October 9, 2017
- November     November 9, 2017
- December     December 11, 2017
- January      January 9, 2018
- February     February 9, 2018
- March        March 9, 2018

Please note: your Budget Director/Dean’s Office may have earlier submission deadlines.
EPAF Resources

- Banner User Guide (currently undergoing updates – will be complete by May 1, 2017):
  - Summer Pay Template 2017
  - Step-by-step Summer EPAF Guides
  - Banner Position Numbers with FOAP – updated monthly
  - EPAF FAQs

https://cms.bsu.edu/about/administrativeoffices/humanresources/banner-user-guide
8 Week/Rapid Growth Courses

- If your department offers either 8 Week or Rapid Growth courses, please see me before you leave today for information on the changes when entering EPAFs for these assignments.
Questions?

- **Secondary Assignments/Summer EPAF Questions (MTH 107):**
  - Teresa Pryor 5-1807
  - Liza Blake 5-1828
  - Cindy Dillingham 5-1821

- **Primary Assignments – contact your HR Rep**
  - Mary Boyd 5-2418
  - Diane Drake 5-1825
  - Gracie Reiff 5-1835
  - Jim Rockhill 5-1824
  - Susan Schlensker 5-1283
  - Kamille Webb 5-1032