

RECIPE TABLE GUIDE

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[Labor Dist](#) - Change Job Labor Distribution (future payrolls)

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EPAF RECIPE: Student Job -1 credits or more required 4S posn S1

suffix Includes non-graduating students with 1 or more credits Spring semester, 0 credits summer session, continuing Fall semester with 1 or more credits.

**Continuing student employees must be reappointed yearly with an effective date 09/01/yyyy or later*

Begin Date	If student is new to the position this date is the same as the effective date. If student is being rehired or a change is being entered this date is the original begin date for this job. This can be found in the "Current Value" column or in Banner form NBAJOBS.
Effective Date	IMPORTANT: This date 'drives' Banner. It is used by the system to determine the date the record becomes active or changes. The active ('A') record effective date should be the first day the student works. NOTE: <i>The effective date cannot be less than the first day of the current pay period.</i> For the term ('T') record the last day of work should be used. (important for web time entry)
Contract Type	Employee must have one active primary job. All others are secondary. If employee has no other job then contract type should be primary.
Job Status	Cannot change; A= Active, T= Terminated
Title	Student: Banner will default the title from the position if left blank. Always use 'student' in the title (e.g. Student – Library)
Job Change Reason	Leave at default unless a change in rate.
Regular Rate	Hourly rate of pay
Timesheet Orgn	This is your department's Web Time Entry org that begins with Z. It associates the Electronic Timesheet on MYINFO with the employee's timesheet approver.
Comment	You must include a brief job description in the comment box and any other comments. Approvers can add comments.

Note: the labor distribution effective date should be the same as the effective date on the active record or the funding may be incorrect distributed.

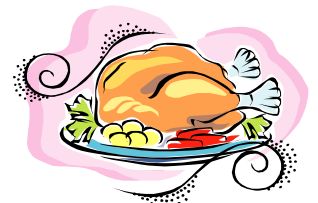
MY EPAF APPROVERS (Default Routing Queue)

1st approver _____

OSP/ES/AES: <http://www.montana.edu/wwwvr/osp/documents/ePcfOrgData.pdf>

Personnel Tech : _____

Payroll Tech: _____



EPAF RECIPE: Short Term (not more than 90 days) 4T position 00 suffix

Replaces the temp/hourly appointment form. Also for students who drop to 0 credits during an academic year. *(does not include continuing students over summer break)*

Begin Date	If employee is new to the position this date is the same as the effective date. If employee is being rehired or a change is being entered this date is the original begin date for this job. This can be found in the "Current Value" column or in Banner form NBAJOBS.
Effective Date	IMPORTANT: This date 'drives' Banner. It is used by the system to determine the date the record becomes active or changes. The active ('A') record effective date should be the first day worked. NOTE: <i>The effective date cannot be less than the first day of the current pay period.</i> For the term ('T') record the last day worked. Cannot be later than 90 days after first day of work.
Personnel Date	Used as a memo date for audit purposes. Leave as default
Contract Type	Must have one active primary job. All others are secondary. If employee has no other job then contract type should be primary.
Job Status	Cannot change; A= Active, T= Terminated
Title	TH - title used to determine rate (see below)
Job Change Reason	Leave at default unless a change in rate.
Regular Rate	Hourly rate of pay (must follow guidelines for Short term workers see http://www.montana.edu/hr/Personnel/Entry%20Rates%20Eff%2001.01.09%20FOR%20WEB.xlsx for appropriate rates or contact Human Resources
Timesheet Orgn	This is your department's Web Time Entry org that begins with Z. It associates the Electronic Timesheet on MYINFO with the employee's timesheet approver.
Comment	You must include a brief job description in the comment box and any other comments. Approvers can add comments.

Note: the labor distribution effective date should be the same as the effective date on the active record or the funding may be incorrect distributed.

MY EPAF APPROVERS (Default Routing Queue)

1st approver _____

OSP/ES/AES _____

Personnel Tech : _____

Payroll Tech: _____



OSP Approver list : <http://www.montana.edu/wwwvr/osp/documents/ePcfOrgData.pdf>

EPAF RECIPE: Change Job Labor Distribution (future payrolls)

Replaces the funding change form

Effective Date	IMPORTANT: This date 'drives' Banner. It is used by the system to determine the date the record becomes active or changes. Labor distribution changes should take effect on the first day of the pay period. You can only make changes to future payrolls. The effective date cannot be earlier than the beginning of the current pay period.
INDEX	Account and percent is required. The Fund, Org, Program etc will populate after you hit SAVE.
Comment	Please give the reason for the request to change funding.

TIPS: If there is a future dated labor distribution change for the job in Banner, you will receive an error if you try to insert a record earlier than the latest dated labor distribution change. Contact the payroll technician for your department to ask for the later record to be removed. **WARNING:** Once removed, the later dated record will be lost unless you submit an EPAF requesting the record be reapplied.

HINT: You will be asked to re-enter the account number after you save the labor distribution. Make sure you save before submitting.

Labor distribution percentages must equal 100%.

You may not have the org security necessary to see all the current funding.

Index, fund and org must be active on the date paid for funding to post correctly.

OSP must approve all Grant related changes

<http://www.montana.edu/wwwvr/osp/documents/ePcfOrgData.pdf>

AES must approve all changes involving Ag index numbers.

ES must approve all changes involving Extension Service funds

MY EPAF APPROVERS (Default Routing Queue)

1st approver _____

OSP/ES/AES _____

Payroll Tech: _____



NOTES: If changing only grant funds OSP is the applier.

EPAF Recipe: *Correct error Effective date cannot be after Empl Term Date Use this to request reactivation of a terminated PEAEMPL record.

This does not replace the new hire process. For a new hire you need to fill out an I-9 and the New Hire Form available at:

<http://www.montana.edu/pps/NewEmployee.htm>

A new student or temp/hourly employee should submit a form W-4 to Human Resources ASAP.

Other types of employees should fill out and submit the appropriate new hire paperwork.

NOTE: You will not be able to submit an appointing EPAF until the record has been applied to Banner by Human Resources

Home Organization	The employee's home org number (home department) An employee may only have one home organization in Banner.
Comments	Please give us additional information: Is the employee returning as a different type of employee? If so what? (e.g. student, temp).

NOTE: If an employee has had a break in service of three years or more, you must complete and submit a new I-9 to Human Resources

Please advise the employee to submit a new W-4 and direct deposit form to Human Resources with any updates in personal information such as address, telephone number, email.

MY EPAF APPROVERS (Default Routing Queue)

Personnel Tech _____

Payroll Tech: _____

NOTES:



EPAF RECIPE: Professional Hourly (4Hposn-00suffix)

Replaces the Professional Hourly appointment form

Begin Date	If employee is new to the position this date is the same as the effective date. If employee is being rehired or a change is being entered this date is the original begin date for this job. This can be found in the "Current Value" column or in Banner form NBAJOBS.
Effective Date	IMPORTANT: This date 'drives' Banner. It is used by the system to determine the date the record becomes active or changes. The active ('A') record effective date should be the first day worked. NOTE: <i>The effective date cannot be less than the first day of the current pay period.</i> For the term ('T') record the last day of job. Cannot be later than 89 days after first day of work .
Personnel Date	Used as a memo date for audit purposes. Leave as default
Contract Type	Must have one active primary job. All others are secondary. If employee has no other job then contract type should be primary.
Job Status	Cannot change; A= Active, T= Terminated
Title	PH - title
Job Change Reason	New Hire or Rehire
Regular Rate	Hourly rate of pay
Timesheet Orgn	This is your department's Web Time Entry org that begins with Z. It associates the Electronic Timesheet on MYINFO with the employee's timesheet approver.
Comment	You must include a brief job description in the comment box and any other comments. Approvers can add comments.

Note: the labor distribution effective date should be the same as the effective date on the Job Detail or the funding may be incorrect distributed.

MY EPAF APPROVERS (Default Routing Queue) Note: HR/ Affirmative Action is a required approver

1st approver _____

OSP/ES/AES _____

Affirmative Action : _____

Personnel Tech : _____

Payroll Tech: _____

OSP approvers:

<http://www.montana.edu/wwwvr/osp/documents/ePcfOrgData.pdf>



EPAF RECIPE: Terminate Current Classified or Faculty or Professional Job

Replaces terminating PTF

This does not replace the term check list. For more info see

<http://www.montana.edu/hr/Payroll/TerminationChecklist.doc>

Effective Date	IMPORTANT: This date 'drives' Banner. It is used by the system to determine the date the record terminates and prorates the earnings for salaried employees. For the term ('T') record enter the last work day of the employee.
Job Change Reason	TERMI = termination
Job Status	Cannot change; T= Terminated
Comment	You must include a terminating reason code from http://www.montana.edu/hr/Payroll/TERMINATION%20CODES.pdf in the comment box and any other comments. Approvers can add comments.

MY EPAF APPROVERS (Default Routing Queue)

HR/AA must approve all Faculty and Professional Terminating EPAFs

1st approver _____

OSP/ES/AES _____

Benefit tech : _____

Payroll Tech: _____



EPAF RECIPE: End 4S or 4T job early (HR must delete current end date 1st)

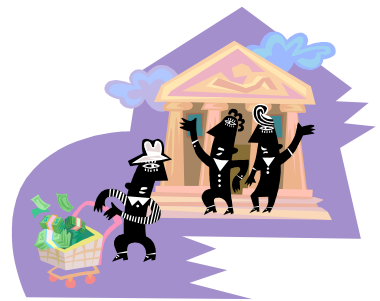
Use this EPAF to replace the original (current) end date with an earlier date

Do not initiate a termination Checklist for Student and Temp jobs

<p>Effective Date Student jobs: Please use last day of month</p>	<p>IMPORTANT: This date 'drives' Banner. It is used by the system to determine the date the record terminates and prorates the earnings for salaried employees. For the term ('T') record Temp jobs: Enter the last work day of the employee for Temp positions. Student jobs: Please use last day of month</p>
<p>Job Change Reason</p>	<p>ENDTM =End of assignment or limited term</p>
<p>Job Status</p>	<p>Cannot change; T= Terminated</p>
<p>Comment</p>	<p>Originators can add comments.</p>

MY EPAF Applier (Default Routing Queue)

Payroll Tech: _____



EPAF RECIPE: Grad Assistant Job AY (4D position) 00 suffix - GRA, GTA,GSA

Replaces the Graduate Assistant Appointment Form (GAAF)

The correct agreement form must be forwarded to the Division of Graduate Education and the student registered for at least six credits (unless pre-authorized by DGE) prior to submitting the EPAF or EPAF may be returned or disapproved.

Begin Date <i>must be in format mm/dd/yyyy</i>	If there is a date in the "Current Value" column enter that as shown in the "Current value". If there is no date then use the "Effective Date" See below for details
Effective Date <i>Must be in format mm/dd/yyyy</i>	IMPORTANT: This date 'drives' Banner. It is used by the system to determine the date the record becomes active or changes. The active ('A') record effective date should be the first day of the pay period . NOTE: <i>The effective date cannot be less than the first day of the current pay period.</i> For the term ('T') record the last day of the pay period should be used
Contract Type	Employee must have one active primary job. All others are secondary. If employee has no other job then contract type should be primary.
Title	Must be in the following format: Grad type (GTA or GRA)-(weekly hours expected to work)Example: GTA-20 or if taking less than six credits GSA(Grad type)-weekly hours Example: GSA(GRA)-10
Job Change Reason	Use NEWHR if employee has not been assigned the job number previously or REHIR if reappointing or extending the job effective dates.
Regular Rate <i>(Do not use \$ or,)</i>	This is the monthly rate (total stipend / number of pays) Example: 5000.00/ 5 monthly pays = 1000.00
Timesheet Orgn	Associates the timesheet with the employee job. Currently Grad assistants don't have a timecard so use the home org.
Comment	You must include a brief job description in the comment box and any other comments. Approvers can add comments.

Note: the labor distribution effective date should be the same as the effective date on the Job Detail or the funding may be incorrect distributed.

Grad Office must approve all Grad EPAFs



EPAF RECIPE: Summer Grad Assistant (4D position) 01 suffix - GRA, GTA,GSA

(The 01 suffix allows a summer appointment to begin the same month the AY appointment is ending) Example: 4D1111-00 ends May 31 and 4D1111-01 begins May 1

Replaces the Graduate Assistant Appointment Form (GAAF)

The correct agreement form must be forwarded to the Division of Graduate Education and the student registered for at least six credits (unless pre-authorized by DGE) prior to submitting the EPAF or the EPAF may be returned or disapproved.

Begin Date <i>must be in format mm/dd/yyyy</i>	If there is a date in the "Current Value" column enter that as shown in the "Current value". If there is no date then use the "Effective Date" See below for details
Effective Date <i>Must be in format mm/dd/yyyy</i>	IMPORTANT: This date 'drives' Banner. It is used by the system to determine the date the record becomes active or changes. The active ('A') record effective date should be the first day of the pay period . NOTE: <i>The effective date cannot be less than the first day of the current pay period.</i> For the term ('T') record the last day of the pay period should be used
Contract Type	Employee must have one active primary job. All others are secondary. If employee has no other job then contract type should be primary.
Title	Must be in the following format: Grad type (GTA or GRA)-(weekly hours expected to work)Example: GTA-20
Job Change Reason	Defaulted to SUMRS- cannot change
Regular Rate <i>(Do not use \$ or,)</i>	This is the monthly rate (total stipend / number of pays) Example: 4000.00/ 4 monthly pays = 1000.00
Timesheet Orgn	Associates the timesheet with the employee job. Currently Grad assistants don't have a timecard so use the home org.
Comment	You must include a brief job description in the comment box and any other comments. Approvers can add comments.

Note: the labor distribution effective date should be the same as the effective date on the Job Detail or the funding may be incorrect distributed.

Grad Office must approve all Grad EPAFs



EPAF RECIPE: Classified Hourly (4N position) 00 suffix

Replaces the Classified PTF

Begin Date	If employee is new to the position this date is the same as the effective date. If employee is being rehired or a change is being entered this date is the original begin date for this job. This can be found in the "Current Value" column or in Banner form NBAJOBS.
Effective Date	IMPORTANT: This date 'drives' Banner. It is used by the system to determine the date the record becomes active or changes. The active ('A') record effective date should be the first day worked. NOTE: <i>The effective date cannot be less than the first day of the current pay period.</i>
Contract Type	Must have one active primary job. All others are secondary. If employee has no other job then contract type should be primary.
Job Status	Cannot change; A= Active,
Title	title used to determine rate must exactly match the title determined by HR and can be found on the <u>Classified Offer Letter</u>
Job Change Reason	Leave at default unless a change in rate.
Regular Rate	Hourly rate of pay is determined by HR and can be found in the <u>Classified Offer Letter</u>
Timesheet Orgn	This is your department's Web Time Entry org that begins with Z. It associates the Electronic Timesheet on MYINFO with the employee's timesheet approver.
Job Change Reason	NEWHR New hire
FTE	Full Time Equivalent from Classified Offer letter
Hours Per Pay	FTE x 174 example: .5 FTE X174 = 87
Comment	You must include a brief job description in the comment box and any other comments. Approvers can add comments.

Note: the labor distribution effective date should be the same as the effective date on the active record or the funding may be incorrect distributed.

MY EPAF APPROVERS (Default Routing Queue)

1st approver _____

2nd approver _____

OSP/ES/AES _____

Benefit tech : _____

Personnel Tech : _____

Payroll Tech: _____

OSP Approver list : <http://www.montana.edu/wwwvr/osp/documents/ePcfOrgData.pdf>

EPAF RECIPE: Classified Salaried (4M Position) 00 Suffix

Replaces the Classified PTF

Begin Date	If employee is new to the position this date is the same as the effective date. If employee is being rehired or a change is being entered this date is the original begin date for this job. This can be found in the "Current Value" column or in Banner form NBAJOBS.
Effective Date	IMPORTANT: This date 'drives' Banner. It is used by the system to determine the date the record becomes active or changes. The active ('A') record effective date should be the first day worked. NOTE: <i>The effective date cannot be less than the first day of the current pay period.</i>
Contract Type	Must have one active primary job. All others are secondary. If employee has no other job then contract type should be primary.
Job Status	Cannot change; A= Active,
Title	title used to determine rate must exactly match the title determined by HR and can be found on the <u>Classified Offer Letter</u>
Job Change Reason	Leave at default unless a change in rate.
Regular Rate	Hourly rate of pay is determined by HR and can be found in the <u>Classified Offer Letter</u>
Timesheet Orgn	Associates the timecard with the employee job. Where do you want the employee's time card to go for this job?
Job Change Reason	NEWHR New hire
FTE	Full Time Equivalent from Classified Offer letter
Hours Per Pay	FTE x 174 (example: .5 FTE X174 = 87 .75FTE = 130.50)
Comment	You must include a brief job description in the comment box and any other comments. Approvers can add comments.

Note: the labor distribution effective date should be the same as the effective date on the active record or the funding may be incorrect distributed.

MY EPAF APPROVERS (Default Routing Queue)

1st approver _____

2nd approver _____

OSP/ES/AES _____

Benefit tech : _____

Personnel Tech : _____

Payroll Tech: _____

OSP Approver list : <http://www.montana.edu/wwwvr/osp/documents/ePcfOrgData.pdf>