

## RECIPE TABLE GUIDE

Select a link or scroll to find the recipe you need.

[AY student](#) - Student Job AY (4Sposn-S1suffix) taking 6 credits or more

[Temp hourly](#) - Temp/hourly job/and students with less than 6 credits (4Tposn-00 for nonstudents 4Tposn-S1 students)

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

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

[Employee record](#) - Activate Employee Record Status (PEAEMPL)

[Professional Hourly](#) - Professional Hourly (4Hposn-00suffix)

[Terminate Current Classified, Faculty and Professional Job](#)

## **EPAF RECIPE: Student Job AY (4Sposn-S1suffix) taking 6 credits or more**

Replaces the Student Referral Form

<b>Begin Date</b>	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.
<b>Effective Date</b>	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. If not known leave the default date in the field.
<b>Contract Type</b>	Employee must have one active primary job. All others are secondary. If employee has no other job then contract type should be primary.
<b>Job Status</b>	Cannot change; A= Active, T= Terminated
<b>Title</b>	Student: Banner will default the title from the position if left blank. Always use 'student' in the title (e.g. Student – HR/PP)
<b>Job Change Reason</b>	Leave at default unless a change in rate.
<b>Regular Rate</b>	Hourly rate of pay
<b>Timesheet Orgn</b>	Associates the timecard with the employee job. Where do you want the employee's time card to go for this job?
<b>Comment</b>	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)

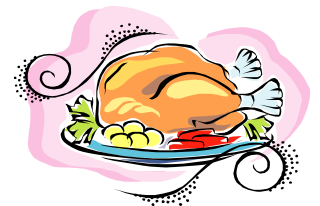
1<sup>st</sup> approver \_\_\_\_\_

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

Benefit tech : \_\_\_\_\_

Personnel Tech : \_\_\_\_\_

Payroll Tech: \_\_\_\_\_



## **EPAF RECIPE: Temp/hourly job/and students with less than 6 credits (4Tposn-00 for nonstudents 4Tposn-S1 students)**

Replaces the temp/hourly appointment form

<b>Begin Date</b>	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.
<b>Effective Date</b>	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 for non students temps.
<b>Personnel Date</b>	Used as a memo date for audit purposes. Leave as default
<b>Contract Type</b>	Must have one active primary job. All others are secondary. If employee has no other job then contract type should be primary.
<b>Job Status</b>	Cannot change; A= Active, T= Terminated
<b>Title</b>	TH - title used to determine rate (see below)
<b>Job Change Reason</b>	Leave at default unless a change in rate.
<b>Regular Rate</b>	Hourly rate of pay (must follow guidelines for temp/hourly workers see <a href="http://www.montana.edu/hr/Personnel/HiringRangeOnly07.pdf">http://www.montana.edu/hr/Personnel/HiringRangeOnly07.pdf</a> for appropriate rates or contact HR/P&P
<b>Timesheet Orgn</b>	Associates the timecard with the employee job. Where do you want the employee's time card to go for this job?
<b>Comment</b>	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)

1<sup>st</sup> approver \_\_\_\_\_

OSP/ES/AES \_\_\_\_\_

Benefit tech : \_\_\_\_\_

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

<b>Effective Date</b>	<b>IMPORTANT:</b> 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.
<b>INDEX</b>	<b>Account and percent is required.</b> The Fund, Org, Program etc will populate after you hit SAVE.
<b>Comment</b>	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)**

1<sup>st</sup> approver \_\_\_\_\_

OSP/ES/AES \_\_\_\_\_

Payroll Tech: \_\_\_\_\_

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



**EPAF Recipe: Activate Employee Record Status (PEAEMPL)**

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 HR/P&P 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 HR/P&P

<b>Home Organization</b>	The employee's home org number (home department) An employee may only have one home organization in Banner.
<b>Comments</b>	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 HR/P&P.

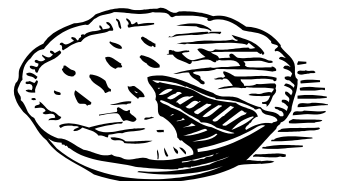
Please advise the employee to submit a new W-4 and direct deposit form to HR/P&P with any updates in personal information such as address, telephone number, email.

MY EPAF APPROVERS (Default Routing Queue)

Personnel Tech \_\_\_\_\_

Payroll Tech: \_\_\_\_\_

NOTES:



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

Replaces the Professional Hourly appointment form

<b>Begin Date</b>	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.
<b>Effective Date</b>	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 for non students temps.
<b>Personnel Date</b>	Used as a memo date for audit purposes. Leave as default
<b>Contract Type</b>	Must have one active primary job. All others are secondary. If employee has no other job then contract type should be primary.
<b>Job Status</b>	Cannot change; A= Active, T= Terminated
<b>Title</b>	PH - title
<b>Job Change Reason</b>	New Hire or Rehire
<b>Regular Rate</b>	Hourly rate of pay
<b>Timesheet Orgn</b>	Associates the timecard with the employee job. Where do you want the employee's time sheet to go for this job?
<b>Comment</b>	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) Note: Affirmative Action is a required approver

1<sup>st</sup> 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, Faculty and 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>

<b>Effective Date</b>	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.
<b>Job Change Reason</b>	TERMI = termination
<b>Job Status</b>	Cannot change; T= Terminated
<b>Comment</b>	You must include a terminating reason code from <a href="http://www.montana.edu/hr/Payroll/TERMINATION%20CODES.pdf">http://www.montana.edu/hr/Payroll/TERMINATION%20CODES.pdf</a> in the comment box and any other comments. Approvers can add comments.

MY EPAF APPROVERS (Default Routing Queue)

1<sup>st</sup> approver \_\_\_\_\_

OSP/ES/AES \_\_\_\_\_

Benefit tech : \_\_\_\_\_

Payroll Tech: \_\_\_\_\_

