

## ELECTRONIC PERSONNEL ACTION FORMS (EPAFs) – TERM DEFINITIONS AND TIPS

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**Effective Date** – The date this action will affect payroll.

\* The Effective Date must be after the Last Paid Date.

**Personnel Date** – This date does not affect pay and serves as an information field for historical, audit, or reporting purposes.

\* The Personnel Date should be the Form I-9 date for all new hires.

\* The Personnel Date field is used to record the actual date. The Effective Date field is used to control the payment.

\* For changes, the Effective Date and Personnel Date will be the same unless the personnel action is retroactive. If the personnel action is retroactive, the Personnel Date is the date the action should have been effective.

**Factor** – Used to calculate the amount per month to be paid. Annual Salary (or Contract Amount) / Factor = Monthly Payment

\* As a general rule, the Factor will be the number of months in the contract / assignment for faculty members, 1 for graduate assistants, and 12 for exempt staff members.

**Pays** – Pays = Factor [Exception: Faculty member with a salary deferral agreement].

\* For all new hires, Factor = Pays. Payroll Services will update the Pays field if a faculty member completes a deferral agreement.

\* Unless the appointment is for less than 12 months, Factor = 12 and Pays = 12 regardless of when the employee is hired during the year.

**Contract Type** – Indicates the type of assignment and controls benefits.

Primary – The employee's primary job.

Secondary – Used to add an additional position for an employee.

Overload – Used for a position in addition to a regular assignment (e.g., non-faculty employee who teaches a class; a faculty member on a 9 month contract who has a summer assignment; housing or car allowance; etc.).

\* Each employee can have only one Primary job.

\* After selecting the approval category, click on the All Jobs button to see other jobs the employee may have.

Examples <i>[Note – The dates used are examples only. Use the actual dates that are applicable for your situation.]</i>	To Be Entered								Banner Calculated	
	Effective Date	Personnel Date	Terminate Job Record Effective Date	Leave w/out Pay w/ Benefits Effective Date	Factor	Pays	Annual Salary / Contract Amount	Regular Rate	Monthly Salary	Biweekly Salary
<b>Faculty member on a 9 month contract</b> <b>[Approval Category: Monthly with end date]</b> Annual Salary / Contract Amount: \$90,000 Month pay is to begin: September 2017 Actual date to start work: 08-21-2017	09-01-2017	08-21-2017		06-01-2018	9	9 <sup>1</sup>	\$90,000		\$10,000	
<b>Faculty member on a 10 month contract</b> <b>[Approval Category: Monthly with end date]</b> Annual Salary / Contract Amount: \$90,000 Month pay is to begin: September 2017 Actual date to start work: 08-21-2017	09-01-2017	08-21-2017		07-01-2018	10	10 <sup>1</sup>	\$90,000		\$9,000	
<b>Faculty member on a 9 month contract</b> <b>[Approval Category: Monthly with end date]</b> Annual Salary / Contract Amount: \$90,000 Month pay is to begin: August 2017 Actual date to start work: 08-21-2017	08-01-2017	08-21-2017		05-01-2018	9	9 <sup>1</sup>	\$90,000		\$10,000	
<b>First year faculty member on a 9 month contract – salary is <u>not</u> to be paid in 9 equal monthly installments and will be prorated in August and May</b> <b>[Approval Category: Monthly with end date]</b> Annual Salary / Contract Amount: \$90,000 Month pay is to begin: August 2017 Actual date to start work: 08-21-2017 Last Date Scheduled to work: 05-11-2018	08-21-2017	08-21-2017		05-12-2018	9	9	\$90,000		\$10,000 <sup>2</sup>	
<b>Adjunct faculty member for fall semester to be paid \$4,000 in 4 equal monthly installments</b> <b>[Approval Category: Monthly with end date]</b> Annual Salary / Contract Amount: \$4,000 Month pay is to begin: September 2017 Month pay is to end: December 2017 Actual date to start work: 08-21-2017	09-01-2017	08-21-2017	12-31-2017		4	4	\$4,000		\$1,000	
<b>Adjunct faculty member for fall semester to be paid \$4,000 in 5 equal monthly installments</b> <b>[Approval Category: Monthly with end date]</b> Annual Salary / Contract Amount: \$4,000 Month pay is to begin: August 2017 Month pay is to end: December 2017 Actual date to start work: 08-21-2017	08-01-2017	08-21-2017	12-31-2017		5	5	\$4,000		\$800	

Examples <i>[Note – The dates used are examples only. Use the actual dates that are applicable for your situation.]</i>	To Be Entered								Banner Calculated	
	Effective Date	Personnel Date	Terminate Job Record Effective Date	Leave w/out Pay w/ Benefits Effective Date	Factor	Pays	Annual Salary / Contract Amount	Regular Rate	Monthly Salary	Biweekly Salary
<b>Adjunct faculty member for fall semester to be paid \$4,000 for 08-15-2017 to 12-31-2017 with August prorated and full months for September through December</b> <b>[Approval Category: Monthly with end date]</b> Annual Salary / Contract Amount: \$4,380.95 Month pay is to begin: August 2017 Month pay is to end: December 2017 Actual date to start work: 08-15-2017	08-15-2017	08-15-2017	12-31-2017		5	5	\$4,380.95 <sup>3</sup>		\$876.19 <sup>3</sup>	
<b>Graduate teaching assistant to be paid in 9 equal monthly installments</b> <b>[Approval Category: Monthly with end date]</b> Annual Salary / Contract Amount: \$1,000 Month pay is to begin: September 2017 Actual date to start work: 08-21-2017	09-01-2017	08-21-2017	05-31-2018		1 <sup>4</sup>	1 <sup>4</sup>	\$1,000 <sup>4</sup>		\$1,000	
<b>Graduate teaching assistant to be paid \$1,550 monthly for the fall semester</b> <b>[Approval Category: Monthly with end date]</b> Annual Salary / Contract Amount: \$1,550 Actual date to start work: 08-21-2017 Last Date Scheduled to work: 12-15-2017	08-21-2017	08-21-2017	12-15-2017		1 <sup>4</sup>	1 <sup>4</sup>	\$1,550 <sup>4</sup>		\$1,550 <sup>5</sup>	
<b>Graduate research assistant to be paid \$1,000 per month – Grant ends April 30, 2018</b> <b>[Approval Category: Monthly with end date]</b> Annual Salary / Contract Amount: \$1,000 Actual date to start work: 10-09-2017 Last date scheduled to work: 04-30-2018	10-09-2017	10-09-2017	04-30-2018		1 <sup>4</sup>	1 <sup>4</sup>	\$1,000 <sup>4</sup>		\$1,000 <sup>6</sup>	
<b>Exempt staff member to be paid \$5,000 monthly</b> <b>[Approval Category: Monthly no end date]</b> Annual Salary / Contract Amount: \$60,000 Actual date to start work: 09-11-2017	09-11-2017	09-11-2017			12	12	\$60,000		\$5,000 <sup>7</sup>	
<b>Nonexempt staff member to be paid \$15 per hour biweekly</b> <b>[Approval Category: Hourly]</b> Regular Rate: \$15 Actual date to start work: 09-11-2017	09-11-2017	09-11-2017			N/A	N/A		\$15		\$1,200 <sup>8</sup>

<sup>1</sup> – Payroll Services will update the Pays field if the faculty member completes a deferral agreement.

<sup>2</sup> – Monthly pay for August 2017 will be prorated based on the start date and number of work days in August 2017. Monthly pay for May 2018 will be prorated based on the end date and the number of work days in May 2018.

<sup>3</sup> – Payment will be over 4.565217 months (13/23 days = 0.565217 for August plus September through December).  $\$4,000 / 4.456217 \text{ months} = \$876.19 \text{ per month}$ .  $\$876.19 \text{ per month} \times 5 \text{ Factor} = \$4,380.95 \text{ Annual Salary (or Contract Amount) to be entered}$ .

August 2017	$(4,380.95 / 5) \times 13/23 =$	\$ 495.24
September 2017	$4,380.95 / 5 =$	876.19
October 2017	$4,380.95 / 5 =$	876.19
November 2017	$4,380.95 / 5 =$	876.19
December 2017	$4,380.95 / 5 =$	<u>876.19</u>
TOTAL TO BE PAID		<u>\$4,000.00</u>

<sup>4</sup> – **For Graduate Assistants only**, enter the monthly salary as the Annual Salary / Contract Amount, Factor = 1, and Pays = 1.

<sup>5</sup> – Monthly pay for August 2017 will be prorated based on the start date and number of work days in August 2017. Monthly pay for December 2017 will be prorated based on the end date and the number of work days in December 2017.

<sup>6</sup> – Monthly pay for October 2017 will be prorated based on the start date and the number of work days in October 2017.

<sup>7</sup> – Monthly pay for September 2017 will be prorated based on the start date and the number of work days in September 2017.

<sup>8</sup> – If time sheet reflects 80 hours.