OVERLOAD EPAF's FOR FACULTY SUMMER SUPPORT

Overload: an Overload job is work done above and beyond the faculty's regular job

Faculty can have several jobs under the same position number

- **ME9900-00 primary job** will always have a **00** suffix
- **ME9900-01, ME9900-02,** etc. indicates **additional** jobs. It is the **"Suffix"** that creates separate jobs.

1. Enter the Faculty's Banner ID in the ID field. **NEVER create/generate a new ID number**. If there are problems locating an ID number, contact Payroll or HR
2. Enter the **Query Date** (must use Payroll Dates for Salaried EPAFs)
   a. Summer 1:   05/22/YYYY
   b. Summer 2:   06/22/YYYY or 07/22/YYYY
   * When entering the year it must be the four-digit year*
3. Select **"Appointment of Temp Secondary/Overload Position – Exempt, TEMJS"** from the Approval Category dropdown list
4. Click **Go**

New EPAF Job Selection

💬 Enter or search for a new position number and enter the suffix, or sele

ID:

Query Date: May 22, 2019

Approval Category: Hiring Process - Tenp Jobs, TEMJS

Employee Job Detail Salary - Step 3 (NBAJOBS), JBDTSL

Search	Type	Position	Suffix	Title	Time Sheet O
🔍	New Job				
	Primary	ME9688	00	Associate Professor	4GEOL1, Geolo Geological Eng

[All Jobs] ⬅

[Next Approval Type] [Go]

5. **Click on the "All Jobs" button to see the faculty's current and previous job suffixes. This is important!!**

    a. A comprehensive list of the faculty's position(s) and details associated with each position: suffix, job type (i.e. Primary, Secondary, Overload), start and end dates, last paid date, and current status of the appointment (i.e. Terminated, Active) will be displayed.

New EPAF Job Selection

💬 Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: Darrin Charles Pagnac, A00002921
Query Date: May 22, 2019
Approval Category: Hiring Process - Tenp Jobs, TEMJS

Employee Job Detail Salary - Step 3 (NBAJOBS), JBDTSL

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									○
	Primary	ME9688	00	Associate Professor	4GEOL1, Geology & Geological Engineering	Aug 22, 2010		Jan 21, 2019	Active	○
	Overload	ME9688	01	Admn-Summer Camp Fossils	4ADMN1, Admissions	Jun 22, 2011	Jul 21, 2018	Jul 21, 2018	Terminated	○
	Overload	ME9688	02	Instructor BHNSFS	440714, BH Nat'l Science Field Station SD	Jun 22, 2011	Aug 21, 2018	Aug 21, 2018	Terminated	○
	Overload	ME9688	03	Summer Camp Army Corps Srvy	440717, Geology & Geological Engineering	Jul 22, 2012	Aug 21, 2019	Aug 21, 2018	Terminated	⦿
	Overload	ME9688	04	Associate Professor	4GEOL1, Geology & Geological Engineering	Jun 22, 2017	Jul 21, 2017	Jul 21, 2017	Terminated	○
	Overload	ME9688	05	Associate Professor	4GEOL1, Geology & Geological Engineering	Jul 22, 2017	Aug 21, 2017	Aug 21, 2017	Terminated	○
	Primary	ME9780	00	Assist Prof/Haslem Postdoc Fel	4GEOL1, Geology & Geological Engineering	Jul 01, 2006	Aug 21, 2010	Aug 21, 2010	Terminated	○
	Overload	ME9780	01	Assistant Professor	4GEOL1, Geology & Geological Engineering	Apr 22, 2007	Jul 21, 2010	Jul 21, 2010	Terminated	○

[Active Jobs]

[Next Approval Type] [Go]

Notice the list above shows jobs starting as early as 2006 with a title of "Assistant Professor" and then more recently the faculty's title has changed to "Associate Professor." Please be aware when selecting a previously used suffix, the title may need to be adjusted to the faculty's current title.

6. Check the jobs list for the faculty's current position number. Then:
   a. Select one of the **suffixes** associated with that positon number
      i. Use the **Title and Time Sheet Organization** fields to identify the most appropriate **Suffix**
   b. If no other suffixes exist beyond the "**00**" primary suffix, then enter the **faculty's current position number and a new suffix** e.g. "01" in the **New Job** line

******* Try** *to use the same Suffix each year for Summer 1 (generally "01" unless the faculty has previously had a Dissertation/Thesis job that utilized "01") and then Summer 2. e.g. in list above ME9688-03 has always been used for Summer 2's "Summer Camp ACS" from 07/22/2012-08/21/2018.*

> ### Never use the "00" or "20" suffix on Summer Support Overload EPAFs!
> - "00" is <u>ONLY</u> for the faculty's <u>Primary</u> job, which is Active
> - "20" is reserved for Telephone stipends

7. Click **"Go"**

Employee Job Detail Salary - Step 3 (NBAJOBS), ME9688-03 Summer Camp Army Corps Srvy, Last Paid Date: Aug 21, 2018

Item	Current Value	New Value
Contract Type: *	Overload	Not selected ∨
Job Begin Date: MM/DD/YYYY*	07/22/2012	
Jobs Effective Date: MM/DD/YYYY*	08/21/2018	
Personnel Date: MM/DD/YYYY	08/21/2018	
Job Status: *	Terminated	Not Selected ∨
Title: *	Summer Camp Army Corps Srvy	
Annual Salary:	0	
Step: *	0	
FTE: *	0	
Employer Code: *	SDMT	Not Selected ∨
Job Change Reason: *	TV013	Not Selected ∨
Timesheet Orgn:	440717	🔍
Supervisor ID: *	A00131325	
Supervisor Position: *	ME9768	
Supervisor Suffix: *	00	
Hours per Day: *	1	
Hours per Pay: *	173.33	
Factor: *	2	
Pays: *	2	
Time Entry Method: *	Payroll Time Entry	Not Selected ∨

8. Fill in **STEP #3 JOB DETAIL SALARY** fields as follows**:**

    a. **Contract Type:** select **OVERLOAD** for this EPAF type (faculty will not have a timesheet or leave report)

    b. **Job Begin Date:** enter the date the faculty first held the position/suffix.

        i. If faculty **has held** the position/suffix before, then enter the job begin date listed in the current value column e.g. 7/22/2012 in example above

        ii. If faculty **has never held** the position/suffix before, enter the start date of the summer session in which they will begin to work e.g. 5/22/2019

    c. **Jobs Effective Date:** enter the beginning date of the pay period

        i. **Summer 1:** 05/22/YYYY

        ii. **Summer 2:** 06/22/YYYY or 07/22/YYYY

    d. **Job Status:** select **ACTIVE**

    e. **Title:** enter the faculty's working title- e.g. "Associate Professor" or "Assoc Prof/Smmr Army Camp" *(please do not use all capital letters)*

    f. **Annual Salary: MUST ENTER 0** on Overload EPAF (*unlike student EPAF*)

    g. **Step:** enter **0**

    h. **FTE:** enter **0**

    i. **Employer Code:** select SDMT, SD School of Mines & Technology

    j. **Job Change Reason:** code selected must begin with an "A"

        i. **AA002—Supplemental Appointment:** "Other"—Use if faculty's overload position is *Non*-Teaching and *Non*-Grant-funded

        ii. **AA004—Summer Teaching Appointment**: "Teaching"—Use if faculty's overload position is Teaching and *Non*-Grant-funded

        iii. **AA006—Summer Research Appointment:** "Grants Research"—Use if faculty's overload position has a*ny* Grant-funding whether partial or 100%

        iv. *Never use "AB000" for Summer Support* **overload EPAFS**

    * Also see EPAF Codes Cheat Sheet attached to these Overload Instructions*

    k. **Timesheet Orgn:** enter the **Hiring Department's Timesheet Org**

    l. **Supervisor's ID:** enter the faculty's Department Head or Hiring Manager

        i. This **cannot** be the faculty whose EPAF is being entered

    m. **Supervisor's Position and Suffix:** enter the Department Head's or Hiring Manager's position number and suffix

      n. Hours per Day: enter **1**

      o. Hours per Pay: <u>**MUST ENTER 173.33**</u> **on Overload EPAF**

      p. Factor and Pay:

          i. Summer 1 (05/22-06/21/YYYY): Factor is 1 and Pay is 1

          ii. Summer 2 (06/22-07/21/YYYY): Factor is 1 and Pay is 1

          iii. Summer 2 (06/22-08/21/YYYY): Factor is 2 and Pay is 2

          iv. Summer 2 (07/22-08/21/YYYY): Factor is 1 and Pay is 1

          v. Factor and Pay fields must match

9. Time Entry Method: **always** select <u>**"Payroll Time Entry"**</u>

Enter Changes	Current Value	New Value
Contract Type: *	Overload	Overload
Job Begin Date: *	07/22/2012	07/22/2012
Jobs Effective Date: *	06/22/2019	06/22/2019
Personnel Date:	06/22/2019	06/22/2019
Job Status: *	Active	Active
Title: *	Summer Camp Army Corp Srvy	Summer Camp Army Corp Srvy
Annual Salary:	0	0
Step: *	0	0
FTE: *	0	0
Employer Code: *	SDMT	SDMT
Job Change Reason: *	AA006	AA006
Timesheet Orgn:	440717	440717
Supervisor ID: *	A00131325	A00131325
Supervisor Position: *	ME9768	ME9768
Supervisor Suffix: *	00	00
Hours per Day: *	1	1
Hours per Pay: *	173.33	173.33
Factor: *	2	2
Pays: *	2	2
Time Entry Method: *	Payroll Time Entry	Payroll Time Entry

10. Fill in **STEP #4 JOB LABOR DISTRIBUTION** fields as follows:

New
Effective Date: MM/DD/YYYY `06/22/2019`

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
S	441723	441723	440717	611030	02					100.00	
										Total:	100.00

✔ Defaulting values for Labor Distribution from the Job records.

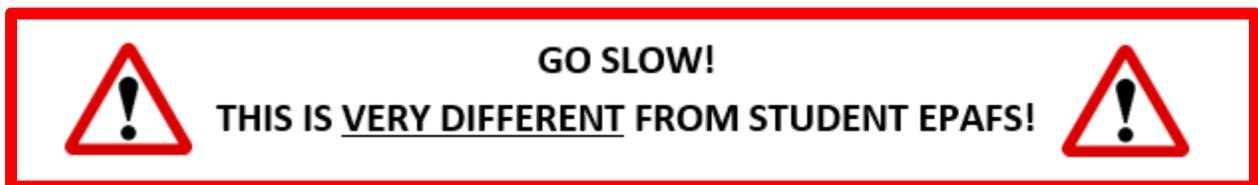[Default from Index] [Save and Add New Rows]

    a. **New Effective Date: <u>must</u>** match Query Date **and** Step #3 Effective Date. If it doesn't, adjust it to match.

    b. **COA:** enter **S**

    c. **Index:** enter the index(es) and percentage(s) identified for funding

    d. Click **"Default from Index"** to auto-populate the FOAPAL string

    e. **Account:** enter **611030** for faculty

    f. Click **"Save and Add New Rows"**

11. Fill in the **STEP #5 JOB DEFAULT EARNINGS** fields as follows:

New Value

Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY	Remove
06/22/2019	SUG, Supplemental Pay for Grants ▾	1.00		1,250.000000	1	08/22/2019	
	Not Selected ▾				1		
	Not Selected ▾				1		
	Not Selected ▾				1		

[Save and Add New Rows]

<div style="border:3px solid red; text-align:center;">

⚠ **GO SLOW!** ⚠
THIS IS <u>VERY DIFFERENT</u> FROM STUDENT EPAFS!

</div>

    a. **New Effective Date:** Enter the **Step #3 Effective Date**.

    b. **Earnings:**

        a. **SUG—Supplemental Pay for Grants:** use if the faculty's overload position **<u>HAS ANY</u>** grant funding. If there are two or more funding sources and one of them is a grant, then select "**SUG**" code

        b. **SSO—Summer Appoint Non-Instruction:** use if the faculty's overload position **DOES NOT** have any grant funding included in the funding source(s) and is for something other than teaching.

c. **TEACHING earning codes** depend on dates of the "BOR Summer School Payment Schedule." Contact the Payroll Office for confirmation of codes below:

   i. **SS1—Summer Session Course 1:** Refer to chart
   ii. **SS2—Summer Session Course 2:** Refer to chart
   iii. **SS3—Summer Session Course 3:** *Only for BHNSFS/geology camps*
   iv. **SS4—Summer Session Course 4:** For Instructors at *non-BHNSFS summer camps* or *teaching dates after SS2* dates on chart

SUG & SSO are used most often, as the teaching codes are used for camp or class instruction. If unsure, contact the Payroll Office!

c. **Hours or Units per Pay**: <u>**MUST ENTER 1**</u> so payroll system only pays out 1 payment of the designated amount (special rate).

d. **Special Rate**: enter the **salary that the faculty will receive for <u>one pay period</u>** (one month of summer support)

   i. If the faculty wants to receive a total max amount of $2,500 for Summer 2 (July and August), then enter $1,250 as the special rate amount and the faculty will receive $1,250 in July and then $1,250 in August

> *A faculty's total monthly summer support salary <u>cannot be more than his/her monthly assigned salary</u> from the most recent academic year. Be sure to check with the faculty about any summer support he/she may be receiving to ensure that the monthly amount is not exceeded. If there are any concerns or questions regarding this, contact the Payroll Office.*

e. **End Date:** enter the **day after** the end of the pay period
   i. e.g. Summer 2 pay period ends 8/21/YYYY, therefore enter 8/22/YYYY

f. **Click "Save and Add New Rows"**

12. Fill in **STEP #6 TEMPORARY EMPLOYEE TERMINATION** fields as follows:

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	07/21/2017	08/21/2019
Personnel Date: MM/DD/YYYY	07/21/2017	08/21/19
Job Status:	Terminated	Terminated
Job Change Reason:	TV013	TV013, Completion Temp Appointment

a. **Jobs Effective Termination Date**: enter the last day of the Pay Period.
   i. e.g. Summer 2's August pay period ends on 08/21/YYYY.

b. **Personnel Date**: enter the same date as the Jobs Effective Termination Date.

c. **Job Status:** select <u>**"Terminated"**</u> from the dropdown list

    d. Job Change Reason: select **"TV013—Completion Temp Appointment"**

        i. *Do not use TV012* *(the code used for Student EPAFs)*

13. Complete the **ROUTING QUEUE**

    a. Same as student EPAFs except, if Overload EPAF has **any grant** funding, then **Grant PI(s) and Office of Sponsored Programs must** be included in the approvals routing

    b. ⚠️ **Payroll Office (149) will be "Approve"** *not "FYI"*

    c. Human Resources (150) will be "Approve"

14. **Comments:** Leave a comment with the **maximum salary** amount the faculty will be paid by this Overload job and add any comments that support this overload.

    a. This amount will be budget checked by the Budget Office or Office of Sponsored Programs to verify the funds are available before the job is approved.

15. Click **"Save"**

16. Review the entire EPAF for completeness and <u>accuracy</u>

17. Click "**Submit**"

    a. If there are any errors, a message will be generated at the top of the screen with details regarding the errors.

    b. Errors must be corrected before the EPAF will submit; warnings are not required to be corrected, but should be reviewed

    c. Correct any errors, save the EPAF again, and click Submit again

18. **A message will appear at the top of the screen when EPAF has been successfully submitted**

EPAF CODES Cheat Sheet

Step #3

- **Job Change Reasons - *Never enter "AB000" for Summer Support***

JOB CHANGE REASON	APPOINTMENT TYPE	DUTY TYPE	USE IF FACULTY IS:
AA002	Supplemental	Other	Not teaching and not funded by grant(s)
AA004	Summer Teaching	Teaching	Teaching and not funded by grant(s)
AA006	Summer Research	Grants Research	Any grant(s) funding at all; even partial

Step #4

- **Account Code for Faculty: 611030**

Step #5

- **Earnings Codes**

EARNINGS CODE	EARNINGS CODE DESCRIPTION	TYPE	USE IF:
SUG	Supplemental Pay for Grants	Grants Research	There is <u>any grant(s) funding</u>; even partial
SUP	Summer Appt – Non-Instructional	Other	Not teaching and not funded by grant(s)
SS1	Summer Session Course 1	Teaching Only	Refer to Chart
SS2	Summer Session Course 2	Teaching Only	Refer to Chart
SS3	Summer Session Course 3	Teaching Only	<u>BHNSF Camps Only</u>
SS4	Summer Session Course 4	Teaching Only	Refer to Chart

Step #6's

- **Job Change Reasons – *Always TV013 for Summer Support***