

HOW TO PROCESS A MERIT INCREASE EPAF

When processing a Merit Increase EPAF, please ensure you send the Performance Evaluation ahead of time to Human Resources.


Merit Increase EPAF should only be used when the employee's receive a satisfactory performance evaluation (rating of 3 or above).



Please note: A Merit Increase EPAF will not be processed unless the Performance Evaluation is received in the HR Office.

Steps	Instructions	Comments
1	Go to the EPAF Menu and select "New EPAF" link > Complete the "New EPAF Person Selection" page then > Complete the "New EPAF Job Selection" page	See page 15-19 for instructions.
2	You are now on the "Electronic Personnel Action Form" – Review the top section to ensure you have identified the person you want to process, the correct Approval Category and the Query Date is accurate based on the EPAF Payroll Calendar.	Note: If any of the information is not correct you must exit the page and start over again.

Electronic Personnel Action Form

 Enter the information for the EPAF and Click Save; then click Submit to **Commit** the transaction.

Name and ID:	Carol M , A00238 5	Job and Suffix:	97 0 -01, BUSINESS LIAISON
Transaction:		Query Date:	Jun 08, 2008
Transaction Status:		Last Paid Date:	Jan 05, 2008
Approval Category:	Merit Salary and Lump Sum, MERCLS		



Steps	Instructions	Comments
3	The Jobs Effective Date will already be defaulted in from the Query Date.	
4	Enter the Personnel Date.	This date is the actual date for the event. For a Merit Increase, it is the day the employee should or will receive their new salary/regular rate.
5	Enter either the Step or Annual Salary/Regular Rate.	Not Both
6	The Job Change Reason is a default. No change needed.	
If the employee is also receiving a Lump Sum payment, you must complete Earning code section.		
7	Select code 172 (Merit Lump Sum Payment) in the "Earnings" column.	
8	Enter a 1 in the "Hours or Unit Per Pay" column.	
9	Enter the lump sum amount in the "Special Rate" column.	
10	Enter the end date which should be 2 weeks after the Effective Date indicated in the column.	On the EPAF Calendar this date is the next date under the Query Date you used for this transaction.

Merit Salary and Lump Sum

[Click here for EPAF Payroll Calendar](#)

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	12/10/2006	<input type="text" value="06/08/2008"/>
Personnel Date: MM/DD/YYYY	06/26/2006	<input type="text" value="01/01/2008"/>
Step:	0	<input type="text"/>
Annual Salary:	73227.04	<input type="text" value="75000"/>
Job Change Reason: (Not Overrideable) ^M		<input type="text" value="ME&LS"/>

Current

Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
11/28/2004	001, Regular Pay	75.00			1	

New Value

Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours *	Special Rate	Shift	End Date MM/DD/YYYY
* Do Not Enter Hours						
<input type="text" value="06/08/2008"/>	172, Merit Lump Sum Payment	<input type="text" value="1"/>	<input type="text"/>	<input type="text" value="2000"/>	<input type="text" value="1"/>	<input type="text" value="06/22/2008"/>
<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="1"/>	<input type="text"/>
<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="1"/>	<input type="text"/>
<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="1"/>	<input type="text"/>
<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="1"/>	<input type="text"/>

Defaulting values for Default Earnings from the Job records.

Steps	Instructions	Comments
11	In the Routing Queue Section, the mandatory Approval Levels appears in this section. Type in the appropriate Banner IDs for each level in the User Name column.	If the Originator completed the Default Routing Queue page then the user names will also appear in this section.
12	Originator may include additional levels if necessary. Use the drop down menu to select the approval levels and required actions.	

Routing Queue

Approval Level	User Name	Required Action
20 - (DEPTAP) Department Approvers	EPAFTR12 Ava M. EPAFTR12	Approve
50 - (BUDGET) Budget	MARTINM1 Miriam E Martinez	Approve
70 - (PAYROL) Payroll	LANES Sharie A Lane	FYI
90 - (HRADMN) HR Data Administration	ROGERSB1 Semper B Rogers	Approve
99 - (APPLY) Appliers	ROGERSB1 Semper B Rogers	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

[Save and Add New Rows](#)

Steps	Instructions	Comments
13	Add a statement or a note in the Comments section to communicate information concerning the employee to all Approvers in the queue.	Comments, such as: Performance evaluation already sent to HR.
14	After you have entered your comments, click on the SAVE button to save all your entries.	

Comment

Employee's performance evaluation has been sent to HR.


[Approval Types](#) | [Default Earnings](#) | [Routing Queue](#) | [Transaction History](#)

[Save](#)


Steps	Instructions	Comments
15	Once you click SAVE , you will receive a message indicating your changes have been save successfully.	
16	Then click on the SUBMIT button to send the transaction to be approved by the Users in the routing queue. You will receive a message indicating you have submitted the transaction successfully.	You will receive a workflow email.

Electronic Personnel Action Form

Your change was saved successfully.


 Enter the information for the EPAF and Click Save; then click Submit to **Commit** the transaction.

Name and ID:	Carol M , A00238 5	Job and Suffix:	97 0 -01, BUSINESS LIAISON
Transaction:	18285	Query Date:	Jun 08, 2008
Transaction Status:	Waiting	Last Paid Date:	Jan 05, 2008
Approval Category:	Merit Salary and Lump Sum, MERSLS		



Electronic Personnel Action Form

The transaction has been successfully submitted.

 Enter the information for the EPAF and Click Save; then click Submit to **Commit** the transaction.