Who should I select for some of the approval levels?
In addition to your Budget Unit Manager and Divisional Executive, there are additional approvers that will need to be selected depending on the type of PAF you are submitting.

Employee/Staff Supplement – BW & BT (includes grants)

- x Grant Accounting Manager – Ann Marie White (only needed for grants)
- x Supplemental Reviewer – Academic Affairs: Kelly Oquist / All Other Depts: Terricita Sass
- x Human Resources – Shilon Sowell
- x Payroll Appr Review – Thomas Morgenweck
- x Payroll – Thomas Morgenweck

Student New Hire / Returning Student

- x Budget Department – Diane Garrison
- x Human Resources TA – Diane Lameze (only needed for new hires)
- x Payroll Student – Thomas Morgenweck

New Hire Federal Work Study/Federal Work Study Reactivate

- x Budget Department – Diane Garrison
- x Financial Aid – Angelica Velez
- x Human Resources – Diane Lameze (only needed for new hires)
- x Payroll Student – Thomas Morgenweck

Student Grant Position New Hire / Returning

- x Grant Accounting Manager – Ann Marie White
- x Human Resources TA – Diane Lameze (only needed for new hires)
- x Payroll Student – Thomas Morgenweck

Terminate/Remove Student in Position

- x Payroll Student – Thomas Morgenweck

Viewing the Payroll Calendar

Refer to the payroll calendar in order to assign the effective date and end date on an ePAF, as well as check when the ePAF is due for a specific pay period.

1) Log into the Stockton portal, click on the Employee tab, then click on the link for the Payroll Calendar under the “Other Links” section.

2) Review the “From” column under the heading Pay Period to ensure you are selecting an appropriate effective date on the ePAF.

    a.

SUPPLEMENTAL PAYMENT REQUEST **GUIDELINES**

Step 1. Identify the type of supplemental payment.

A. Supplemental payment for completing a project or guest speaker
BEFORE employee starts the project, the following must be completed:
- Written approval from BUM, DE and immediate supervisor;
- Written approval from HR confirming compensation rate calculations is correct and no conflicts with the employee's union contract;
- Funding must be secured.

B. Supplemental payment for taking on "out of title" extra duties for an employee who is on leave
BEFORE employee performs extra duties, the following must be completed:
- Written approval from BUM, DE and immediate supervisor;
- Written approval from HR confirming compensation rate calculations, supplemental timeframe, and compliance with the employee's union contract. Please note, if extra duties are within the scoop of the employees' current position, the employee will not qualify for a supplemental payment;
- Funding must be secured.

C. Supplemental payment for performing "out of title" extra duties for a vacant position currently being searched
BEFORE employee starts the project, the following must be completed:
- Written approval from BUM, DE and immediate supervisor;
- Written approval from HR confirming compensation rate calculations, supplemental timeframe, and compliance with the employee's union contract. Please note, if extra duties are within the scoop of the employees' current position, the employee will not qualify for a supplemental payment;
- Funding must be secured.

D. Supplemental payment for Grant related work
BEFORE employee starts the project, the following must be completed:
- Must go through the Office of Sponsored Research and Programs (postaward@stockton.edu).

E. Supplemental payment for teaching a non-credit class or training course
BEFORE employee starts the project, the following must be completed:
- Approval from BUM, DE and immediate supervisor;
- Funding must be secured.

F. Supplemental payment for summer institutes and summer orientation (covered by MOA)
- No pre-approval required, ePAF can be submitted (in comment section of ePAF you must note "request # not required due to payment being covered under union negotiated MOA).

G. Supplemental payment for Managers
BEFORE employee starts the project, the following must be completed:
- Written approval from BUM, DE, immediate supervisor;
- Written from President or Executive Vice President & Chief of Staff (does not require HR approval);
- Funding must be secured.

Once you have identified the type of supplemental payment, secured the required written approval, funding is in place, and you have your position number, you can submit the supplemental payment request form through the payroll website.

Step 2. Submit a supplemental payment request form

Log into your Stockton portal, click on employee tab > payroll > forms > supplemental pay request form.

A. Employee Information
- Enter the employees name who will receive the supplemental payment;
- Enter the employee Z#;
- Enter the Divisional Executive who will be responsible for the funding - select from the drop-down;
- Enter the Budget Unit Manager's email who is responsible for the funding;
- If the BUM entered is not the employee's immediate supervisor, you MUST copy their direct supervisor by clicking on "add another cc address" and enter their email address;
- If supplemental is grant funded, you must check the box (tya0.004Tw 0.207 0 T7 0 Tdment3Tc 0 Tw 4 37 0 T

D. Attach PDF file
   - ƒ Upload any backup related to the supplemental payment request (ex: HR written approval, job duties, President's written approval).

E. Submit Request
   - ƒ Click on the blue Submit Request button.

Step 3. Once submitted, you will receive an email confirmation and your request will be reviewed and approved by the following:

- ƒ Budget Unit Manager (BUM)
- ƒ Employee's direct supervisor (if BUM is not direct supervisor)
- ƒ Divisional Executive
- ƒ Human Resources (if required)
- ƒ Supplemental Reviewer (Kelly Qquist for Academic Affairs and Theresa Marinelli for President's office)

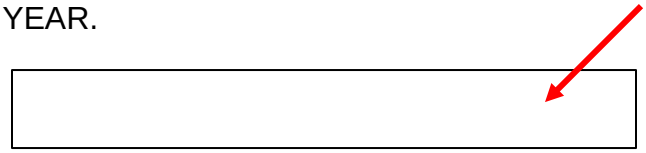
Step 4. Once all above email approvals are provided, submit a supplemental ePAF. Please refer to the ePAF manual for instructions; the link isthe

Employee/Staff Supplemental ePAF

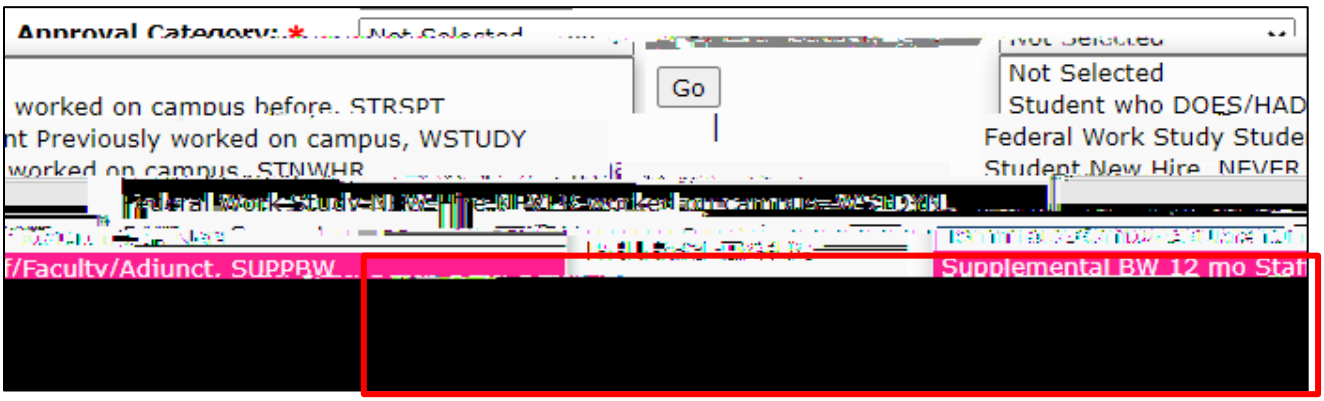
What information is needed to complete the ePAF?

- Effective Date – this is the start date of the pay period the employee will be compensated. This date must be the first day of the current pay period or for future pay periods.
- End Date – first day of the next pay period
- Request number generated from your approved supplemental pay request form
- Employee name or Z#
- Position Number – must be a valid position number. ePAFs with wrong position numbers will be disapproved and a new ePAF will need to be created.
- Total amount to be paid per period

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.
2) Click on the Employee tab, ePAF Main Menu > New ePAF.
3) Input the Z# (include the Z) or click on the magnifying glass to use the search function to search by name
4) Query date defaults to the date you are starting the form YOU MUST CHANGE THE YEAR TO THE PREVIOUS YEAR.



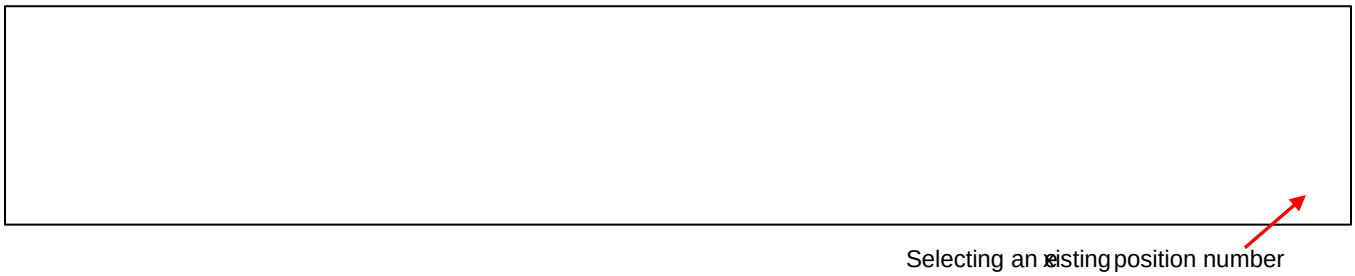
5) On the Approval Category field, select the appropriate supplemental category and click Go. Note – All employees should be entered as BW-(12 month) for pay periods 15 – 18.



6) Click All Jobs and all previous position numbers for this employee will populate. Check to see if the position number you are looking for is listed.

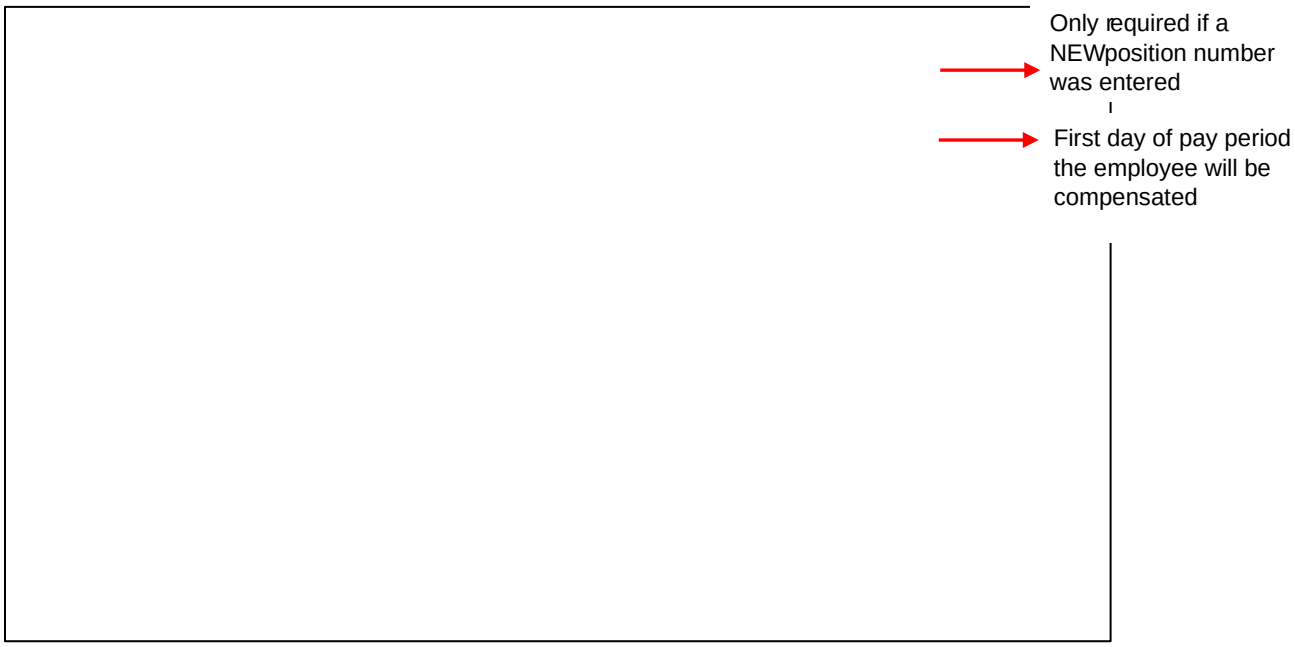
7) If this is a new position number for the employee, input the position number and the suffix, which will always be 00, then click Go, or…

…select an existing position number and click Go.



8) Refer to the current payroll calendar to fill in the jobs effective date, which is the first day of the pay period the employee will be compensated.

   a. The Job Begin Date is required if you entered a new position number and must be the same as the Jobs Effective Date. If you did not enter a new position number, leave this field blank.



9) Scroll down to the Default Earning section and input the following:

You may enter additional lines for payments to be made for future pay periods (see example below), but please email Payroll and cc your BUM and Supplemental Reviewer if a payment ever needs to be cancelled.

10) Scroll down to the Routing Queue and select the routing information shown below. If you have set up default routing for this type of ePAF, your approvers should have prepopulated, but you can still make changes if needed by using the Search option. The Grant Accounting Manger approver

Student New Hire (has never worked on campus) ePAF

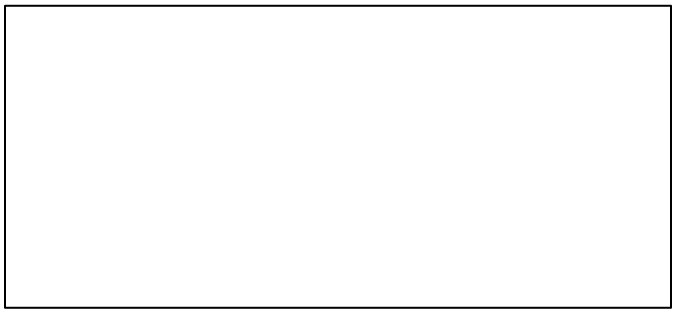
Steps that need to be taken prior to completing the Student New Hire ePAF:

- Student completes application
- Department emails Human Resources with the names of the student(s).
- HR sends an email to the student(s) with a link to the onboarding forms
- Students complete first part of I-9, department completes second part of I-9
- Process ePAF

What information is needed to complete the ePAF?

- Student Z# or name
- Date the I-9 was verified

8) Scroll down to the Routing Queue and select the routing information shown below. If you have set up default routing for this type of EPAF, your approvers should have populated, but you can still make changes if needed by using the Search option.



Diane Garrison

Diane Lamezec

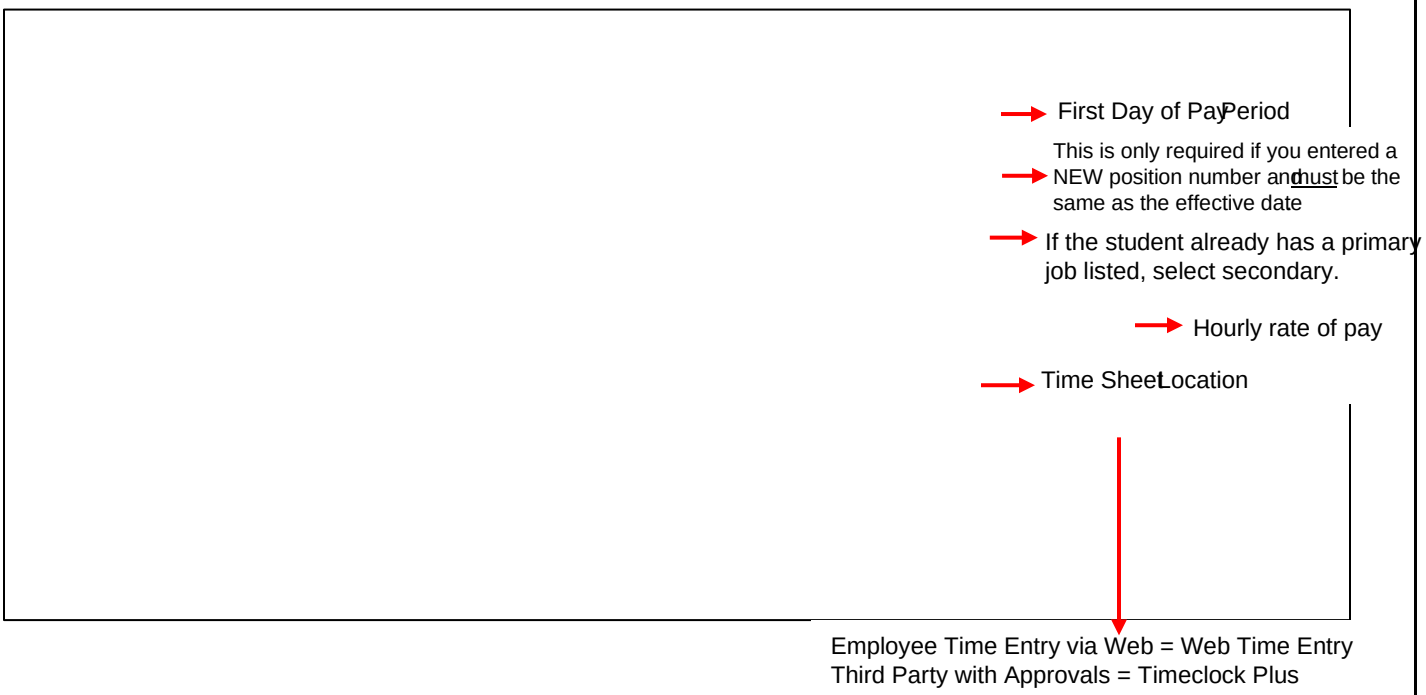
9) Comments are required. Input the name of the person who will be approving the student's timesheet. After you have added your comments, click Save. You must always save your EPAF before submitting it.

10) If you are ready to send the ePAF, click on Submit. Any warning messages can be ignored, but any ERROR messages must be corrected. If you receive an error message, make the necessary corrections, click Save then Submit. You will receive the message below confirming the ePAF was successfully submitted, and the transaction status will show as pending.

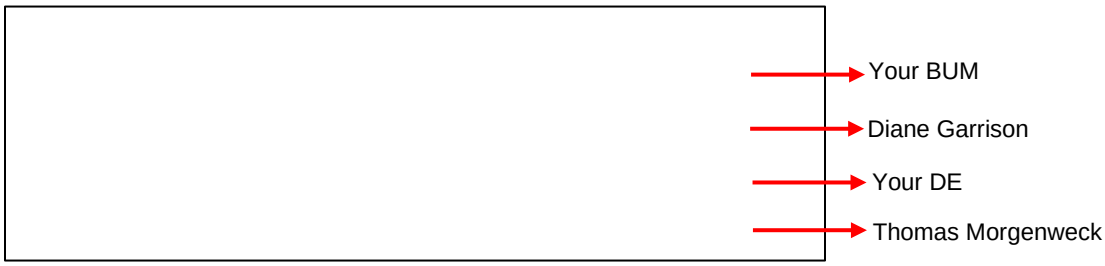
6) Click All Jobs to view all previous position numbers. Check to see if the position number you are looking for is listed.

7) Select the position number you would like to reactivate, if this is a new position for the student, input the new position number, suffix will always be (00), then click Go

8) Input the required information highlighted below



9) Scroll down to the Routing Queue and select the routing information for each approval level. If you have set up default routing for this type of ePAF, your approvers should have pre-populated, but you can still make changes if needed by using the Search option.



10) Comments are required. Input the name of the person who will be approving the student's timesheet.

11) After you have added your comments, click Save. **You must always save your EPAF before submitting it**

12) If you are ready to send the ePAF, click on Submit. Any warning messages can be ignored, but any ERROR messages must be corrected. If you receive an error message, make the necessary corrections, click Save then Submit. *If you put in a new position number

Federal Work Study New Hire (has never worked on campus) ePAF

Steps that need to be taken prior to completing the Student New Hire ePAF:

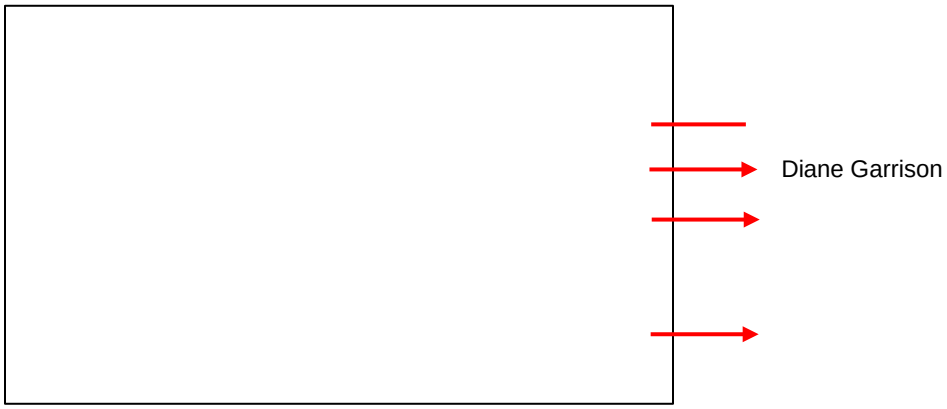
- Interview and select prospective FWS employee
- Department emails Office of Financial Aid with the name of the student.
- Student is given a link to apply for position.
- HR sends an email to the student with a link to the onboarding forms
- Students complete first part of I-9, department completes second part of I-9
- Process ePAF

What information is needed to complete the ePAF?

- Student Z# or name
- Date the I-9 was verified
-

4) The q

8) Scroll down to Routing Queue and select the routing information shown below. If you have set up default routing for this type of ePAF, your approvers should have prepopulated, but you can still make changes if needed by using the Search option.



9) Comments are required. Input the name and contact information (email and extension) of the person in your office who oversees the student worker. After you have added your comments, click Save – you must always save your EPAF before submitting it

10) If you are ready to send the ePAF, click on Submit. Any warning messages can be ignored, but any ERROR messages must be corrected. If you receive an error message, make the necessary corrections, click Save then Submit. You will receive the message below confirming the ePAF was successfully submitted, and the transaction status will show as pending.

Federal Work Study Rehire/Reactivate/Change in Pay Rate ePAF

What information is needed to complete the ePAF?

- Student Z# or name
- Job effective date (first day of the pay period the student will start working)
- Position Number (received from Financial Aid)
- Rate of pay
- Timesheet org
- Time entry method

Creating a Federal Work Study Rehire/Reactivate/Change in Pay Rate ePAF

1)

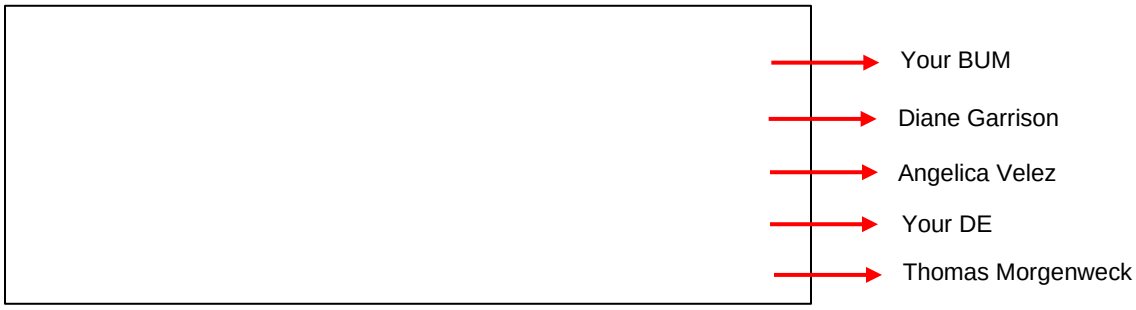
5) On the Approval Category field, select code WSTUDY for a federal work study student who has previously worked, then click Go.

6) Click All Jobs to view all previous position numbers. Check to see if the position number you are looking for is listed.

7) Select the position number you would like to reactivate, or if this is a new position for the student, input the position number, suffix will always be (00), then click Go.

8) Input the required information highlighted below.

9) Scroll down to the Routing Queue and select the routing information shown below. If you have set up default routing for this type of PAF, your approvers should have prepopulated, but you can still make changes if needed by using the Search option.



10) Comments are required. Input the name and contact information (email and extension) of the person in your office who oversees the student worker. After you have added your comments, click Save – you must always save your EPAF before submitting it

11) If you are ready to send the ePAF, click on Submit. Any warning messages can be ignored, but any ERROR messages must be corrected. If you receive an error message, make the necessary corrections, click Save then Submit. If you put in a new position number and receive the error shown below after submitting, you must input the Job Begin Date (first day of pay period) in order to correct the error*.

12) After correcting any errors, click Save then Submit. You will receive the message below confirming the ePAF was successfully submitted, and the transaction status will show as pending.

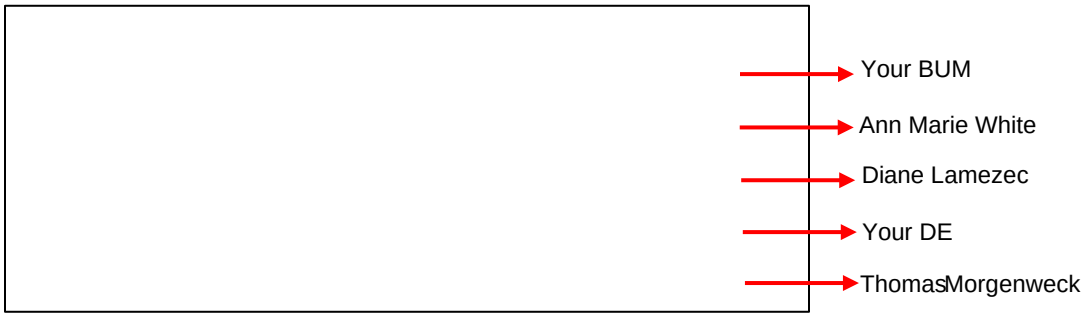
Student Grant Position New Hire (has never worked on campus) ePAF

Steps that need to be taken prior to completing the Student New Hire ePAF:

9

4)

8) Scroll down to the Routing Queue and select the routing information shown below. If you have set up default routing for this type of EPAF, your approvers should have prepopulated, but you can still make changes if needed by using the Search option.



9) Comments are required. Input the name of the person who will be approving the student's timesheet. After you have added your comments, click Save. You must always save your EPAF before submitting it.

10) If you are ready to send the ePAF, click on Submit. Any warning messages can be ignored, but any ERROR messages must be corrected. If you receive an error message, make the necessary corrections, click Save then Submit. You will receive the message below confirming the ePAF was successfully submitted, and the transaction status will show as pending.

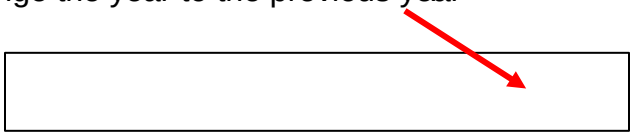
Student Grant Position Rehire/Reactivate/Change in Pay Rate ePAF

What information is needed to complete the ePAF?

- Student Z# or name
- Job effective date (first day of the pay period the student will start working)
- Position Number
- Rate of pay
- Timesheet org
- Time entry method

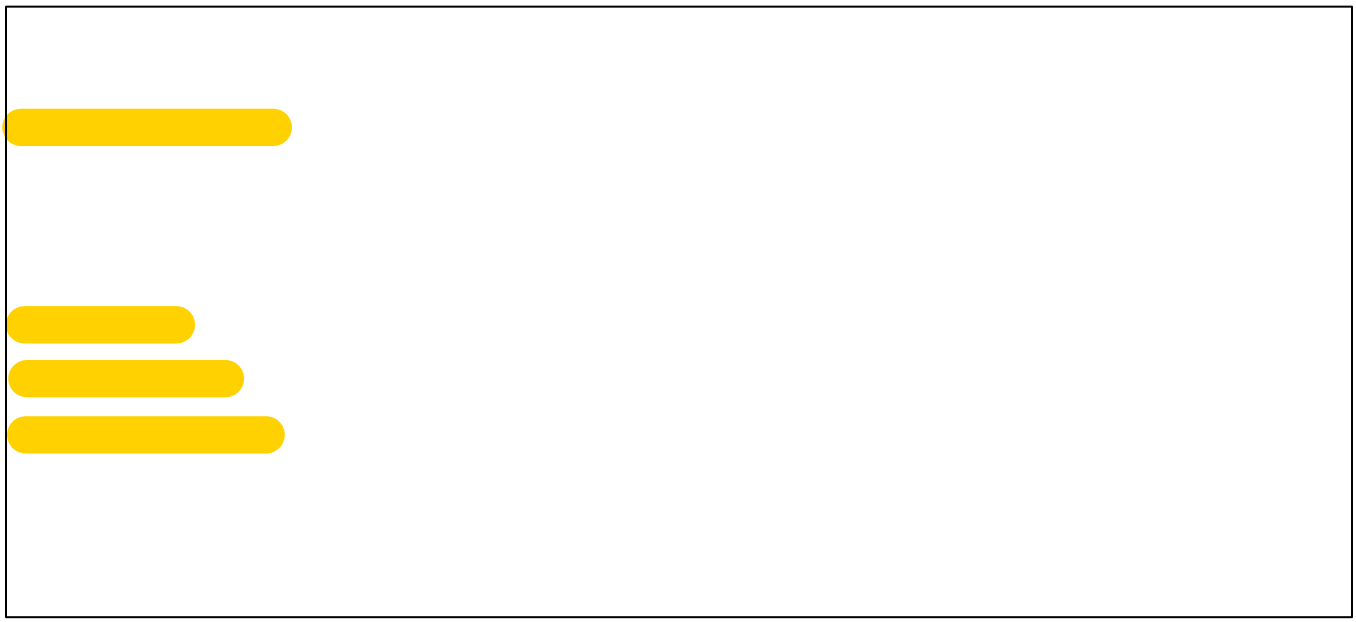
Creating a Grant Position Student Rehire/Reactivate/Change in Pay Rate ePAF

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.
2) Click on the Employee tab > ePAF Main Menu > New ePAF.
3) Input the Z# (include the Z) or use the search function to search by name.
4) The query date defaults to the date you are starting the form. The query date must be earlier than or equal to the effective date for the job. To ensure that the query date is earlier than the effective date, change the year to the previous year.

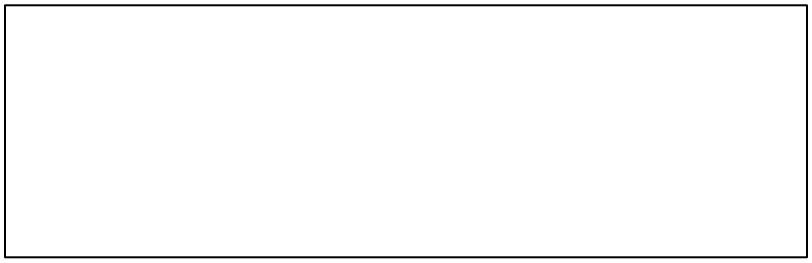


5) On the Approval Category field, select code GSRE for a student grant position rehire, then click Go.
6) Click All Jobs to view all previous position numbers. Check to see if the position number you are looking for is listed.
7) Select the position number you would like to reactivate, or if this is a new position for the student, input the position number, suffix will always be (00), then click Go.

8) Input the required information highlighted below.



9) Scroll down to the Routing Queue and select the routing information shown below. If you have set up default routing for this type of ePAF, your approvers should have prepopulated, but you can still make changes if needed by using the Search option.



Your BUM

10) Comments are required. Input the name of the person who will be approving the student's timesheet. After you have added your comments, click Save. You must always save your ePAF before submitting it.

11) If you are ready to send the ePAF, click on Submit. Any warning messages can be ignored, but any ERROR messages must be corrected. If you receive an error message, make the necessary 9

Terminating a Student Position ePAF

All Federal Work Study student terminations will be handled by the Office of Financial Aid. These instructions are for terminating Non-Federal Work Study students. All student worker positions will be automatically terminated if the student hasn't been paid from that position number in 60 days.

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.
2) Click on the Employee tab > ePAF Main Menu > New ePAF.
3) Input the Z# (include the Z) or use the search function to search by name.
4) Query date defaults to the date you are starting the form and can be left as is.
5) On the Approval Category field, select code STTN to terminate/remove a student from a position, then click Go.
6) Select the position you would like to terminate then click Go.
    a. If you do not see the position number listed, that position has already been terminated.
7) Input the Jobs Effective Date which is the last day of the pay period listed in the "To" column on the payroll calendar). If the student has not/will not post any hours for the current pay period, you can use the end date of the previous pay period as your effective date.

8) Scroll down to the Routing Queue and select the routing information shown below, if necessary. If you have set up default routing for this type of ePAF, your approver should have pre-populated.

9) If you are ready to send the ePAF, click on Submit. Any warning messages can be ignored, but any ERROR messages must be corrected. If you receive an error message, make the necessary corrections, click Save then Submit.

Submitting a Saved ePAF or Resubmitting a Returned ePAF

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.
2) Click on the Employee tab > ePAF Main Menu > ePAF Originator Summary.
3) All ePAFs that have been returned to you or have not been submitted will be listed under your Current tab.
4) Click on a name to open the specific ePAF.
5) Click on Update.
6) Make any necessary changes/updates then click Save.

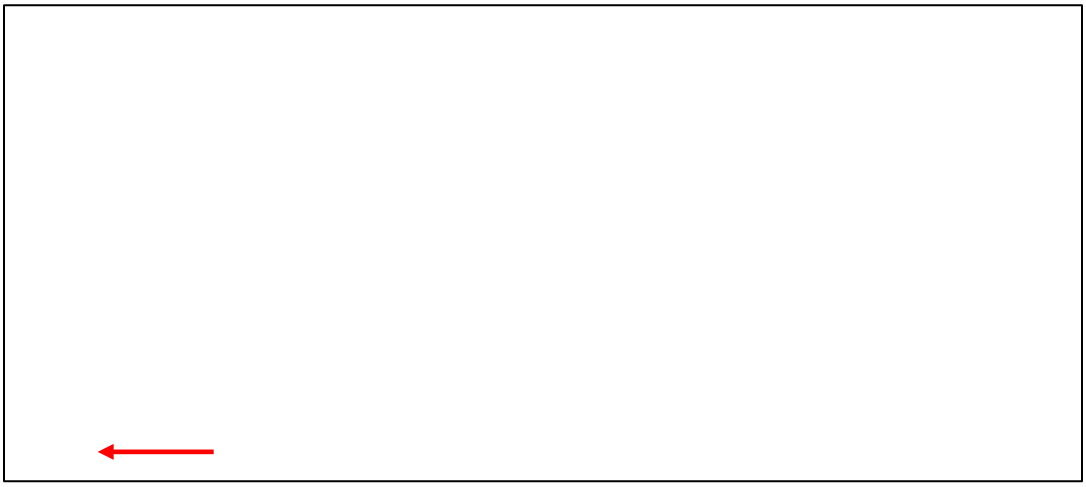
Approving an ePAF

Approvers receive email notification when an ePAF is assigned to them for approval.

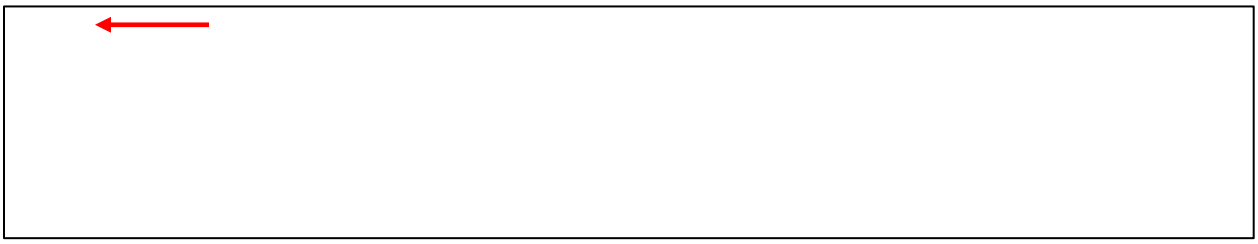
1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.
2) Click on the Employee tab > ePAF Main Menu > ePAF Approver Summary.
3) You will land on the "current" tab. All ePAFs that are ready for you to approve will be listed.

   - Current: ePAFs awaiting your approval.
   - In My Queue: ePAFs that will eventually be in your current tab. You cannot take action on these ePAFs as they are either assigned to another approver or have not yet been submitted.
   - History: A list of ePAFs you have already taken action on.
4) Review the ePAFs listed in your current tab.
   - Anything in blue is linked. All submitted ePAFs will have a comment from the Originator, indicated by **. Click on a name to open and view the ePAF.

   - What to look for on the ePAF
     - Approval Category = the type of ePAF being submitted
     - Rate of pay per hour if it's a student ePAF
     - Special rate for supplemental payments = total to be paid for that pay period
     - Read comments for additional pertinent information

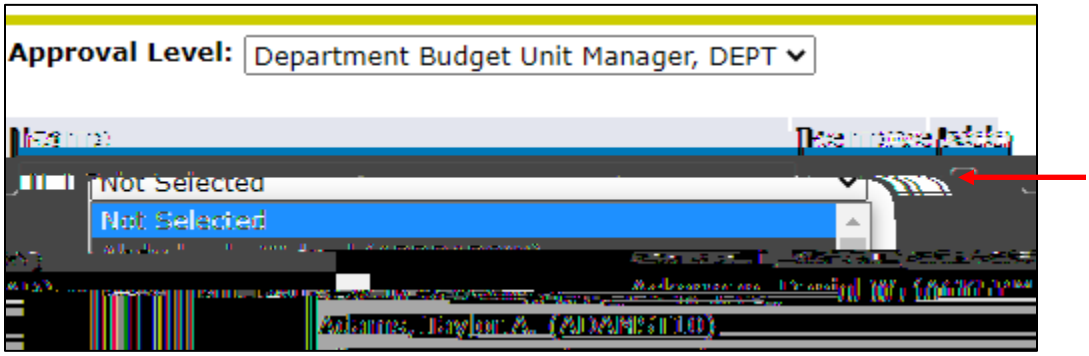


7) Click on the Next arrow to view the next report in your queue OR click on the PAF Approver Summary to go back to your list. <u>Do not</u> use the back arrow on your browser to go back as your list will not refresh.



How to Set up a Proxy

1) Log into the Stockton portal, click on the Employee tab, then click on the link for Self Service Banner.
2) Click on the Employee tab > PAF Main Menu > New PAF Approver Summary.
3) Click on Update Proxies.
4) If you are in multiple approval levels, select the appropriate approval level.
5) Select a name from the drop down menu then click Add.



6) Click Save.