How to Originate a Full-time to Part-time Transfer (TRAN25)

These instructions will guide you through creating a TRAN25 EPAF used to transfer a full-time employee who is resigning their full-time position to become a part-time employee with a new part-time position (either facutly or staff). This EPAF cannot be used for full-time employees who are retiring and wanting to come back to work part-time. Those types of transactions will require a termination EPAF and a new hire EPAF. If the employee is going into a part-time position they held in the past, use a TRAN26.
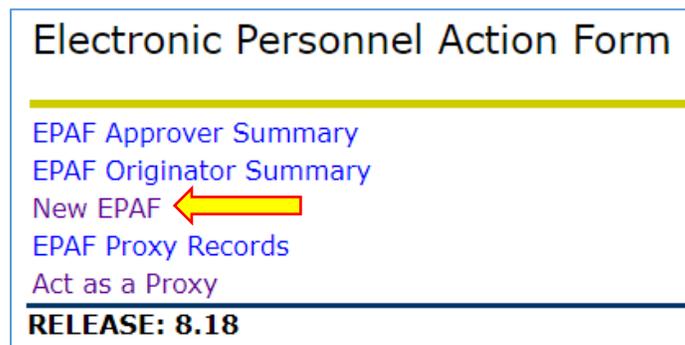
1. Log into SOS, and click on the *My Employee Information* tab:

| SJC ALERT ME! | Career Resources | My Information | My Employee Information | My Student Records |

2. Click on the *Electronic Personnel Actions* link:

Electronic Personnel Actions
- Displays menu for EPAFs

3. Click on the *New EPAF* link:
(Please note this screenshot may look different from your menu based on Banner access.)

Electronic Personnel Action Form

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy
RELEASE: 8.18

4. Enter the GID for the employee who is transferring, the Query Date (the effective date of the transfer, which in this case will be the day after the last day they work in their full-time position), and select the TRAN25 EPAF from the drop down menu, and click *Go*:
   a. In this example, our full-time employee's last day is 01/10/2021, so we want the Query Date to be the next day, which is 01/11/2021. The termination date for the full-time job will be entered on a specific line within the EPAF later in the process.

New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

ATTENTION: 90 Day Exception EPAFs are no longer being used. If you need to request that your part-time employee work more than the allowed 19.5 hours will work over the 19.5 hours.

* - indicates a required field.

ID: * G01084318   Kevin Griffin
Query Date: MM/DD/YYYY* 01/11/2021
Approval Category: * Job Transfer - Full-time to Part-time, TRAN25
Go

5. If the employee is transferring to a new address, leave the *New Record* button selected and click the *Next Approval Type* button:

Address Selection

To add a new record, choose New Record. Or, choose the record to be updated under Select.

ID: Kevin Griffin, G01084318
Query Date: Jan 11, 2021
Approval Category: Tran FT to PT, TRAN25

Public San Jacinto Address Information

Type	From and To Date	Address	Status	Select
New Record				●
San Jacinto College Address	Jun 01, 2020 to Current Date	13735 Beamer Road S-11.102 S-11 Houston, Texas 77089	Active	○

✔ Address Type defaulted from Electronic Approval Category Form (NTRACAT).

[Show All Addresses]
[Next Approval Type]

   a. If the employee is keeping the same address, select the *Active* address and click the *Next Approval Type* button:

Public San Jacinto Address Information

Type	From and To Date	Address	Status	Select
New Record				○
San Jacinto College Address	Jun 01, 2020 to Current Date	13735 Beamer Road S-11.102 S-11 Houston, Texas 77089	Active	●

6. If the employee is transferring to a new phone number, leave the *New Record* button selected and click *Go*:

Telephone Selection

To add a new record, choose New Record. Or, choose the record to be updated under Select.

ID: Kevin Griffin, G01084318
Query Date: Jan 11, 2021
Approval Category: Tran FT to PT, TRAN25

Public San Jacinto Telephone Information

Type	Telephone	Status	Address Type	Select
New Record				●
College Work Telephone	281-9986150 1234	Primary Active	San Jacinto College Address	○

✔ Telephone Type defaulted from Electronic Approval Category Form (NTRACAT).

[Show All Phones]
[Go]

a. If the employee is keeping their phone number, select the I phone number and click *Go*:

Public San Jacinto Telephone Information

Type	Telephone	Status	Address Type	Select
New Record				○
College Work Telephone	281-9986150 1234	Primary Active	San Jacinto College Address	●

7. Select the full-time job to ==terminate== and click *Next Approval Type*:

New EPAF Job Selection

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

ID: Kevin Griffin, G01084318
Query Date: Jan 11, 2021
Approval Category: Tran FT to PT, TRAN25

Terminate Existing Job Assignment, JOBS89

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									○
	Primary	C99165	00	Asst, Student Success Center	53401, Student Success Center	Jun 01, 2020			Active	●

[All Jobs]
[Next Approval Type] [Go]

8. Enter the new part-time POSN (see EPAF Data Standards on the EPAF webpage for POSN guidance, if needed), enter the suffix (00), and click *Go:*

New EPAF Job Selection

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

ID: Kevin Griffin, G01084318
Query Date: Jan 11, 2021
Approval Category: Tran FT to PT, TRAN25

Create Job Assignment - Hourly Staff, JOBS12

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job	PT3401	00	PT Student Assistant I	53401, Student Success Center					●
	Primary	C99165	00	Asst, Student Success Center	53401, Student Success Center	Jun 01, 2020			Active	○

[All Jobs]
[Next Approval Type] [Go]

9. Once you are in the EPAF, you will see the transaction information is missing. This information will auto-populate once you save and submit your EPAF.

Electronic Personnel Action Form

💬 Enter the information for the EPAF and either Save or Submit.

Name and ID: Kevin Griffin, G01084318
Transaction: **Query Date:** Jan 11, 2021
Transaction Status:
Approval Category: Job Transfer - Full-time to Part-time, TRAN25

[Save]

10. The *Terminate Existing Job Assignment* block of the EPAF will terminate the existing full-time job. Enter the last date that the employee will work in their full-time job in the *Job Effective Date* field.
    a. In this example, the employee's last day to work in their full-time job is 01/10/2021. (Remember, that's why we listed the Query Date for this EPAF as 01/11/2021 because that is when they will start their new part-time job.)
    b. The *Job Change Reason* should always be *RESIG, Resignation* because this EPAF is only to be used for full-time employees who are resigning their full-time position to transfer to a part-time position.

Terminate Existing Job Assignment, C99165-00 Asst, Student Success Center

Item	Current Value	New Value
Job Effective Date: MM/DD/YYYY*	06/01/2020	01/10/2021
Personnel Date: MM/DD/YYYY	06/01/2020	
Job Status: *(Not Enterable)	Active	T
Job Change Reason: *	NEW	RESIG, Resignation

11. If the employee is getting a new address, you should have selected *New Record* on the address selection screen earlier in the transaction. The new address will need to be entered following the correct format, which can be found on the EPAF Data Standards on the EPAF webpage.

Public San Jacinto Address Information

Item	Current Value	New Value
Address Type: (Not Enterable)		SJ
Address Sequence No.:		
Address From Date: MM/DD/YYYY		01/11/2021
Address Line 1:		13735 Beamer Road
Address Line 2:		S-8.105
Address Line 3:		S-8
City:		Houston
State:		TX, Texas
ZIP or Postal Code:		77089
Source: (Not Enterable)		

Public San Jacinto Telephone Information

Item	Current Value	New Value
Telephone Type: (Not Enterable)		SJ
Telephone Seq. No.:		
Area Code:		281
Telephone Number:		9986150
Phone Extension No.:		4512

a. If you selected that the employee was keeping their address and phone number, the address and phone number *Sequence Number* will auto-populate under the *New Value* column, and you will not need to enter any address or phone number information.

Public San Jacinto Address Information

Item	Current Value	New Value
Address Type: (Not Enterable)	SJ, San Jacinto College Address	SJ
Address Sequence No.:	1	1
Address From Date: MM/DD/YYYY	06/01/2020	01/11/2021
Address Line 1:	13735 Beamer Road	
Address Line 2:	S-11.102	
Address Line 3:	S-11	
City:	Houston	
State:	TX, Texas	TX, Texas
ZIP or Postal Code:	77089	
Source: (Not Enterable)		

Public San Jacinto Telephone Information

Item	Current Value	New Value
Telephone Type: (Not Enterable)	SJ, College Work Telephone	SJ
Telephone Seq. No.:	1	1
Area Code:	281	
Telephone Number:	9986150	
Phone Extension No.:	1234	

12. The *Hire Employee* block is information needed for the employee's new part-time role.
   a. Enter the appropriate Employee Class Code:
      ➢ part-time staff = 31
      ➢ FWS = 40
      ➢ TWS = 41
      ➢ part-time faculty = 07
   b. In this screenshot, the employee stayed in the same ORG, but you should update the *New Value* column with the appropriate the Home and Distribution ORG if they are changing ORGs.
   c. The *Adjusted Service Date* must be updated to follow:
      ➢ If current hire date is from March 1 – December 31, use 09/01/current year
      ➢ If current hire date is from January 1 – February 28/29, use 09/01/previous year

Hire Employee

Item	Current Value	New Value
Employee Status: *	Active	Active
Employee Class Code: *	21, Non-Exempt Salary - Full Time	31
Campus Code: *	S, South Campus (000090)	S, South Campus (000090)
Home COAS: *	J	J
Home Organization: *	53401, Student Success Center	53401
Distribution COA:	J	
Distribution Orgn:	53401, Student Success Center	53401
Current Hire Date: MM/DD/YYYY*	06/01/2020	01/11/2021
Adjusted Srvc Date: MM/DD/YYYY	06/01/2020	09/01/2020

13. The *Create Job Assignment* block is job information. Enter the correct title and hourly pay rate using a Board approved title and corresponding rate of pay. You will also need to enter the Leader ID (G#) and Leader Position (POSN) as they are required fields.

Create Job Assignment - Hourly Staff, PT3401-00 PT Student Assistant I

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		01/11/2021
Contract Type: *		Primary
Job Effective Date: MM/DD/YYYY*		01/11/2021
Personnel Date: MM/DD/YYYY		
Title:		PT Non-Certified Tutor
Step: *		0
Regular Rate: *		9.00
Job Change Reason: *		NEW, New Hire
Payroll ID:		Not Selected
Timesheet Orgn:		
Leader ID: *		
Leader Position: *		
Leader Suffix: *		00

14. The *Job Labor Distribution* block should not need to be edited since this is a direct feed from Banner. If you update the FOAP, leave a comment at the bottom of the EPAF as to why you are making a change.

Update Job Labor Distribution, PT3401-00 PT Student Assistant I

Current
Effective Date: 01/11/2021
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New
Effective Date: MM/DD/YYYY 01/11/2021

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
J		100300	53401	614100	520500					100.00

15. Enter the appropriate user names in the *Routing Queue* by selecting the magnifying glass icon for each level. If you the part-time job is a work-study or grant job, you must add Financial Aid or OGM as an approval level and list their required action as *Approve*.

Routing Queue

Approval Level	User Name	Required Action
20 - (HRREVW) HR Review		Approve
25 - (FLEVEL) First Level Leader		Approve
50 - (BENE) Benefits		FYI
99 - (HRAPLY) HR EPAF Apply		Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Save and Add New Rows

16. Leave a comment, if applicable, and then click the *Save* button:

Comment

[   ]

Save
Return to Top

17. After clicking the *Save* button, you will return to the top block of the EPAF where you will see there is a transaction number and status. Click the *Submit* button.
    a. If you have any errors, your EPAF will not submit. The errors will be listed directly below the top block of the EPAF. You will need to correct them, click *Save* and then click *Submit* again.
    b. You can disregard any warnings, as they do not prevent the EPAF from submitting.

Electronic Personnel Action Form

✔ Your change was saved successfully.
💬 Enter the information for the EPAF and either Save or Submit

Name and ID: Kevin Griffin, G01084318
Transaction: 69881   **Query Date:** Jan 11, 2021
Transaction Status: Waiting
Approval Category: Job Transfer - Full-time to Part-time, TRAN25
Save   Submit   Delete

18. Once you have successfully submitted the EPAF, the transaction status will turn from *Waiting* to *Pending*.

Electronic Personnel Action Form

✔ The transaction has been successfully submitted.
💬 Enter the information for the EPAF and either Save or Submit

Name and ID: Kevin Griffin, G01084318
Transaction: 69882
Transaction Status: Pending
Approval Category: Job Transfer - Full-time to Part-time, TRAN25

19. Once your EPAF has been fully approved, the transaction status will change from *Pending* to *Approved*.

EPAF Preview

✔ This transaction must be updated on the Electronic Personn
Name and ID: Kevin Griffin, G01084318
Transaction: 69882
Transaction Status: Approved
Approval Category: Job Transfer - Full-time to Part-time, TRAN25

20. Once HR has applied your EPAF, the transaction status will change from *Pending* to *Completed.*
   a. When a full-time employee goes from full-time to part-time, the EPAF will likely take longer to be applied because all full-time pay and benefits must be processed. You should expect delays when processing this type of transaction.

EPAF Preview

✔ This transaction must be updated on the Electronic Person
Name and ID: Kevin Griffin, G01084318
Transaction: 69882
Transaction Status: Completed
Approval Category: Job Transfer - Full-time to Part-time, TRAN25