

This handout provides information to help you correctly complete a PITR. Other job aids which can assist you with this process are:

- ✓ Job Change Reason Codes job aid
- ✓ E-Class job aid

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| Employee Information | | | | | | | | | | |
|----------------------|--------------|---------------------------------------|-------------------------------------|-------------------|----------------|--------------------|--------------------|-----------------------------------|-----------------------------------|-----------------|
| | Last Name | First Name | Middle Name | E-Class | E-Class Desc | COA-Home Dept Code | COA-Home Dept Desc | COA & Org Check Distribution Code | COA & Org Check Distribution Desc | Employee Status |
| Current | | | | | | | | | | |
| New | | | | | | | | | | |
| | Employee FTE | Benefit Category (Code & Description) | Leave Category (Code & Description) | Current Hire Date | First Work Day | Last Work Day | Termination Date | Termination Code | Termination Reason | |
| Current | | | | | | | | | | |
| New | | | | | | | | | | |
| VISA Expiration Date | | | | | | | | | | |
| Current | (blank) | | | | | | | | | |

- Last Name:** The person's last name. Name should be the employees tax name (the last name that appears on their Social Security Card). Nicknames are not allowed.
- First Name:** The person's first name. Name should be the employees tax name (the first name that appears on their Social Security Card). Nicknames are not allowed.
- Middle Name:** The person's middle name. Name should be the employees tax name (the middle name that appears on their Social Security Card). Nicknames are not allowed.
- E-Class:** Employee Class groups employees based on shared attributes, such as benefits and leave accruals.
- COA- Home Dept. Code:** The Home Department code on the Employee Information Form (PEAEMPL) contains two fields: Chart of Account (COA) and Organization. This combined code represents the campus and unit to which the employee is assigned. This does not have to reflect the campus on which the employee is working necessarily.
- COA & Org Check Distribution Code:** The Check Distribution code on the Employee Information Form (PEAEMPL) contains two fields: Chart of Account (COA) and Organization. The combined code represents the location to which the employee's paychecks are sent.
- Employee Status:** Contains the status of the employee. The employee status must be: A (Active) or T (Terminated). Active means the person is actively employed by the University. Employees on leave from one or more jobs are still considered Active. Terminated means the employee has no affiliation with the University.
- Employee FTE:** The Full-Time Equivalent value. This is the total percentage of time (expressed in decimals to the tenth) of all jobs held by the employee. An employee's total FTE cannot exceed 1.0. For example: if the employee holds one job at .5 FTE and one job at .25 FTE, his/her Employee FTE is equal to .75 FTE. An FTE of 1 indicates full-time employment.
- Benefit Category (Code & Description):** The benefit category assigned to the employee denotes the benefits for which the employee is eligible (including health insurance, life insurance, etc.).
- Leave Category (Code & Description):** The leave category assigned to the employee reflects the type(s) of accrued leave for which the employee is eligible and the rate at which it is earned. Types of leave include Vacation, Sick, and Floating Holidays.
- Current Hire Date:** The most recent date of hire.
- First Work Day:** The employee's first work day following activation or reactivation.
- Last Work Day:** The last day the employee actually performed work at the University. It is not necessarily the last date the employee was paid by the University.
- Termination Date:** The Termination Date is the date the employee's employment at the University was terminated. A termination date must be entered if a termination reason has been entered.
- Termination Code:** Identifies the reason the employee was terminated from University employment.
- Termination Reason:** A Termination Reason must be entered if a Termination Date is entered. The Termination Reason Rules table (PTRTREA) lists all possible reasons.
- VISA Expiration Date** The Visa Expiration Date is the date on which the Visa or other international documentation expires, thus making the employee ineligible to work in the United States.

| Job Information--Position No./Suffix: | | | | | | | | |
|--|-----------------------|-----------------|------------|----------------|--------------|-----------|------------------------|------------------------|
| | Personnel Change Date | Position/Suffix | Job Status | Job Begin Date | Job End Date | Job Title | Job Change Reason Code | Job Change Reason Desc |
| Current | | | | | | | | |
| New | | | | | | | | |

| | Job Type | Job FTE | Job Appt % | COA-Timesheet Org | Timesheet Org Title | Job Leave Category | Job E-Class | Job E-Class Desc |
|---------|----------|---------|------------|-------------------|---------------------|--------------------|-------------|------------------|
| Current | | | | | | | | |
| New | | | | | | | | |

| | |
|---------------------------------|--|
| Personnel Change Date: | This is the date that reflects when the transaction should occur in the future or should have occurred in the past. |
| Position/Suffix: | The Position Number is a six-character identifier. The Suffix is a two-character code that further defines the Position. |
| Job Status: | This field indicates the status of a particular job. The only field values that should be used are Active (A), Leave without pay with Benefits (B), Leave with full pay with benefits , Terminated (T) |
| Job Begin Date: | Begin date of Job |
| Job End Date: | End date of Job |
| Job Title: | Official title of the specific job. The title initially defaults from the Position, but can be overridden. |
| Job Change Reason Code: | This is a five-character code for the Job Change Reason.(See Job Change Reason Code job aid) |
| Job Change Reason Desc.: | Description for the Job Change Reason Code. |
| Job Type: | The Job Type represents whether the job is Primary (drives the Home Department for the employee), Secondary, or Overload. An employee may have only one Primary job. |
| Job FTE: | Employee FTE is the Full-Time Equivalent value. This is the total percentage of time (expressed in decimals to the tenth) of all jobs held by the employee. An employees total FTE cannot exceed 1.0. For example: if the employee holds one job at .5 FTE and one job at .25 FTE, his/her Employee FTE is equal to .75 FTE. An FTE of 1 indicates full-time employment. |
| Job Appt%: | Percentage of the Job FTE that the employee is actually working. This field should only be used during a Leave of Absence. |
| COA- Timesheet Org: | This is the Chart of Account or campus code and Organization code for the Timesheet Organization. |
| Timesheet Org Title: | This is the title of the Organization associated with the COA - Timesheet Org field. |
| Job Leave Category: | The leave category assigned to the job reflects the type(s) of leave for which the job is eligible. Types of leave include Vacation, Sick, and Floating Holidays. |
| Job E-Class: | The Employee Class Code associated with the Job. (See Addendum B) |
| Job E-Class Desc: | The description of the Employee Class Code associated with the Job. |

| Job Salary Information--Position No./Suffix: | | | | | | | |
|---|--------------------|------------------------------|------------------------|------------------------|-----------------------|-----------------------|---------------------------|
| | Personnel Chg Date | Salary Group (CS Only) | Salary Table (CS Only) | Salary Grade (CS Only) | Salary Step (CS Only) | Hourly Rate (CS Only) | Permanent Shift (CS Only) |
| Current | | | | | | | |
| New | | | | | | | |
| | | | | | | | |
| | Annual Salary | Assign Salary (Monthly Only) | Pays | Time Entry Method | | | |
| Current | | | | | | | |
| New | | | | | | | |

- Personnel Change Date:** This is the date that a change to the job record should have been effective. It is not possible to back date information in Banner prior to the last pay date. Therefore the Personnel Chg Date is used to reflect the date on which a transaction should have occurred.

- Salary Group (CS Only):** This field displays a code describing the Salary Group for the job.
- Salary Table (CS Only):** This field displays a code describing the Salary Table for the job.
- Salary Grade (CS Only):** This field displays a code describing the Salary Grade for the job.
- Salary Step (CS Only):** This field displays a code describing Salary Step for the job. The step determines the Rate and Annual Salary based on the Position Class entered on the Position (NBAPOSN).

- Hourly Rate (CS Only):** This field displays the Hourly Rate. Entry into this field should only be completed for Civil Service and hourly employees.
- Permanent Shift (CS Only):** This field displays the Permanent Shift.

- Annual Salary:** This field displays the Annual Salary for all employees. Entry into this field should only be completed for employees on the Monthly PayID.
- Assign Salary (Monthly Only):** This field represents the pay period salary. For employees on the Monthly PayID, this field is the amount paid each pay period. For hourly employees, this is a calculated rate (rate*hour). Payment for hourly employees is based on time entry.
- Pays:** The number of pay periods in a year. The value is set to 12 for monthly and 26 for bi-weekly.
- Time Entry Method:** Displays the method of time entry for the job. The values for this field include Payroll Time Entry, Employee Time Entry via Web, Department Time Entry with Approvals, and Third Party with Approvals.

| Job Labor Distribution: C--FOAPAL | | | | | | | | | | | |
|-----------------------------------|----------------|---------|-------------------------|-----|-------|------|-----|---------|---------|----------|----------|
| | Effective Date | Percent | Amount of Annual Salary | COA | Index | Fund | Org | Account | Program | Activity | Location |
| Current | | | | | | | | | | | |
| New | | | | | | | | | | | |

- Effective Date:** The Date the record became or will become effective for Payroll purposes. When creating a new record making a change, the Effective Date cannot be earlier than the last paid date.

- Percent:** Percent of funding for the Job that is paid out of this FOAPAL string. Total of all FOAPALS must equal 100.

- Amount of Annual Salary:** Percent * Job Annual Salary = Amount to be paid on that Job Labor Distribution (C-FOAPAL). The total for all Amount of Annual Salary fields should be equal to the total salary being paid on the Job.

- COA:** The Chart of Accounts (COA) code represents the campus with which the funding for the Job is associated.

- Index:** This field displays the six digit Index Code identifying the organization.

- Fund:** This field displays the six-digit Fund code identifying the fund from which money is paid for the Job. Codes validate against the Finance Fund Table FTVFUND.

- Org:** This field displays the six-digit Organization code identifying the organization that is funding the Position. Codes validate against the Finance Organization Table FTVORGN.

- Account:** This field displays the six-digit Account code identifying the account from which money is budgeted for the Position. Codes validate against the Finance Account Table FTVACCT.

- Program:** This field displays the six-digit Program code identifying the program with which the Position budget is associated. Codes validate against the Finance Program Table FTVPROG.

- Activity:** Optional field.

- Location:** This field is used to identify where a fixed asset is located. The Location Code is from Banner FTVLOCN. This field will not be used by HR.

| Job Service Dates & Anniversary Date Information | | | | | |
|--|----------------|-----------------------------|---------------------------|----------------------------------|----------------------------|
| | Effective Date | Contract Service Begin Date | Contract Service End Date | Salary Commitment (Monthly Only) | Anniversary Date (CS only) |
| Current | | | | | |
| New | | | | | |

- Effective Date:** The Date the record became or will become effective for Payroll purposes. The effective date must be after the last paid date.
- Contract Service Begin Date:** Date field that displays the begin date of the contract. This field is a memo field and is not used in Pay Calculation.
- Contract Service End Date:** Date field that displays the end date of the contract. This field is a memo field and is not used in Pay Calculation.
- Salary Commitment (Monthly Only):** Displays the salary commitment associated with the contract.
- Anniversary Date (CS Only):** Date field that displays the anniversary date of the contract.

| Job Leave of Absence Information--Position No./Suffix: | | | | | | | | | |
|--|------------|------------|------------------|----------------|----------------------|--------------------|------------------|------------------|------------------------|
| | Leave Type | Leave Desc | Leave Begin Date | Leave End Date | Expected Return Date | Actual Return Date | Percent of Leave | Last Day of Work | Last Day in Pay Status |
| Current | | | | | | | | | |
| New | | | | | | | | | |

- Leave Type:** Displays the reason for an employee's leave of absence. The Leave Type is chosen from a list of values from the Leave Reason Rule Form (PTRLREA).
- Leave Desc:** Describes the Leave Type.
- Leave Begin Date:** The Leave Begin Date will initially contain the requested start date of a leave and will be updated to contain the actual start date upon approval. The information will be entered into the Approved Leave Begin field on Employee Leave of Absence Form (PZAELOA) in Banner.
- Leave End Date:** The Leave End Date will initially contain the requested end date of a leave and will be updated to contain the actual end date upon approval. The information will be entered into the Approved Leave End field on Employee Leave of Absence Form (PZAELOA) in Banner.
- Expected Return Date:** This is the expected date of return from leave.
- Actual Return Date:** Date field that tracks the Actual Return Date from leave.
- Percent of Leave:** This field reflects the percentage of time that the employee will be granted leave from his/her job.
- Last Day of Work:** Date field that tracks the Last Day of Work of the employee in his/her job.
- Last Day in Pay Status:** Date field that tracks the Last Day in Pay Status of the employee in his/her job.

| Additional Job Information | | | | | | | | |
|----------------------------|-----------------------|-----------------|------------|-------------------|---------------------|--------------------|------------------------|------------------------|
| | Personnel Change Date | Position/Suffix | Job Status | Job Begin Date | Job End Date | Job Title | Job Change Reason Code | Job Change Reason Desc |
| New | | | | | | | | |
| Additional Job Information | | | | | | | | |
| | Job Type | Job FTE | Job Appt % | COA-Timesheet Org | Timesheet Org Title | Job Leave Category | Job E-Class | Job E-Class Desc |
| New | | | | | | | | |

| | |
|---------------------------------|--|
| Personnel Change Date: | This is the date that reflects when the transaction should occur in the future or should have occurred in the past. |
| Position/Suffix: | The Position Number is a six-character identifier. The Suffix is a two-character code that further defines the Position. |
| Job Status: | This field indicates the status of a particular job. |
| Job Begin Date: | Begin date of Job |
| Job End Date: | End date of Job |
| Job Title: | Official title of the specific job. The title initially defaults from the Position, but can be overridden. |
| Job Change Reason Code: | This is a five-character code for the Job Change Reason.(See Job Change Reason Code job aid) |
| Job Change Reason Desc.: | Description for the Job Change Reason Code. |
| Job Type: | The Job Type represents whether the job is Primary (drives the Home Department for the employee), Secondary, or Overload. An employee may have only one Primary job. |
| Job FTE: | Employee FTE is the Full-Time Equivalent value. This is the total percentage of time (expressed in decimals to the tenth) of all jobs held by the employee. An employees total FTE cannot exceed 1.0. For example: if the employee holds one job at .5 FTE and one job at .25 FTE, his/her Employee FTE is equal to .75 FTE. An FTE of 1 indicates full-time employment. |
| Job Appt%: | Percentage of the Job FTE that the employee is actually working. This field should only be used during a Leave of Absence. |
| COA- Timesheet Org: | This is the Chart of Account or campus code and Organization code for the Timesheet Organization. |
| Timesheet Org Title: | This is the title of the Organization associated with the COA - Timesheet Org field. |
| Job Leave Category: | The leave category assigned to the job reflects the type(s) of leave for which the job is eligible. Types of leave include Vacation, Sick, and Floating Holidays. |
| Job E-Class: | The Employee Class Code associated with the Job. (See Addendum B) |
| Job E-Class Desc: | The description of the Employee Class Code associated with the Job. |

| Additional Job Salary Information | | | | | | | |
|-----------------------------------|--------------------|------------------------------|------------------------|------------------------|-----------------------|-----------------------|---------------------------|
| | Personnel Chg Date | Salary Group (CS Only) | Salary Table (CS Only) | Salary Grade (CS Only) | Salary Step (CS Only) | Hourly Rate (CS Only) | Permanent Shift (CS Only) |
| New | | | | | | | |
| | Annual Salary | Assign Salary (Monthly Only) | Pays | Time Entry Method | | | |
| New | | | | | | | |

- Personnel Change Date:** This is the date that a change to the job record should have been effective. It is not possible to back date information in Banner prior to the last pay date. Therefore the Personnel Chg Date is used to reflect the date on which a transaction should have occurred.

- Salary Group (CS Only):** This field displays a code describing the Salary Group for the job.

- Salary Table (CS Only):** This field displays a code describing the Salary Table for the job.

- Salary Grade (CS Only):** This field displays a code describing the Salary Grade for the job.

- Salary Step (CS Only):** This field displays a code describing Salary Step for the job. The step determines the Rate and Annual Salary based on the Position Class entered on the Position (NBAPOSN).

- Hourly Rate (CS Only):** This field displays the Hourly Rate. Entry into this field should only be completed for Civil Service and hourly employees.

- Permanent Shift (CS Only):** This field displays the Permanent Shift.

- Annual Salary:** This field displays the Annual Salary for all employees. Entry into this field should only be completed for employees on the Monthly PayID.

- Assign Salary (Monthly Only):** This field represents the pay period salary. For employees on the Monthly PayID, this field is the amount paid each pay period. For hourly employees, this is a calculated rate (rate*hour). Payment for hourly employees is based on time entry.

- Pays:** The number of pay periods in a year. The value is set to 12 for monthly and 26 for bi-weekly.

- Time Entry Method:** Displays the method of time entry for the job. The values for this field include Payroll Time Entry, Employee Time Entry via Web, Department Time Entry with Approvals, and Third Party with Approvals.

| Additional Job Labor Distribution: C--FOAPAL | | | | | | | | | | | |
|---|----------------|---------|-------------------------|-----|-------|------|-----|---------|---------|----------|----------|
| | Effective Date | Percent | Amount of Annual Salary | COA | Index | Fund | Org | Account | Program | Activity | Location |
| New | | | | | | | | | | | |

- Effective Date:** The Date the record became or will become effective for Payroll purposes. When creating a new record making a change, the Effective Date cannot be earlier than the last paid date.

- Percent:** Percent of funding for the Job that is paid out of this FOAPAL string. Total of all FOAPALs must equal 100.

- Amount of Annual Salary:** Percent * Job Annual Salary = Amount to be paid on that Job Labor Distribution (C-FOAPAL). The total for all Amount of Annual Salary fields should be equal to the total salary being paid on the Job.

- COA:** The Chart of Accounts (COA) code represents the campus with which the funding for the Job is associated.

- Index:** This field displays the six digit Index Code identifying the organization.

- Fund:** This field displays the six-digit Fund code identifying the fund from which money is paid for the Job. Codes validate against the Finance Fund Table FTVFUND.

- Org:** This field displays the six-digit Organization code identifying the organization that is funding the Position. Codes validate against the Finance Organization Table FTVORGN.

- Account:** This field displays the six-digit Account code identifying the account from which money is budgeted for the Position. Codes validate against the Finance Account Table FTVACCT.

- Program:** This field displays the six-digit Program code identifying the program with which the Position budget is associated. Codes validate against the Finance Program Table FTVPROG.

- Activity:** Optional field.

- Location:** This field is used to identify where a fixed asset is located. The Location Code is from Banner FTVLOCN. This field will not be used by HR.

| Additional Job Service Dates & Anniversary Date Information | | | | | |
|---|----------------|-----------------------------|---------------------------|----------------------------------|----------------------------|
| | Effective Date | Contract Service Begin Date | Contract Service End Date | Salary Commitment (Monthly Only) | Anniversary Date (CS only) |
| New | | | | | |

| | |
|--|--|
| Effective Date: | The Date the record became or will become effective for Payroll purposes. The effective date must be after the last paid date. |
| Contract Service Begin Date: | Date field that displays the begin date of the contract. This field is a memo field and is not used in Pay Calculation. |
| Contract Service End Date: | Date field that displays the end date of the contract. This field is a memo field and is not used in Pay Calculation. |
| Salary Commitment (Monthly Only): | Displays the salary commitment associated with the contract. |
| Anniversary Date (CS Only): | Date field that displays the anniversary date of the contract. |

| Additional Job Leave of Absence Information | | | | | | | | | |
|---|------------|------------|------------------|----------------|----------------------|--------------------|------------------|------------------|------------------------|
| | Leave Type | Leave Desc | Leave Begin Date | Leave End Date | Expected Return Date | Actual Return Date | Percent of Leave | Last Day of Work | Last Day in Pay Status |
| New | | | | | | | | | |

| | |
|--------------------------------|--|
| Leave Type: | Displays the reason for an employee's leave of absence. The Leave Type is chosen from a list of values from the Leave Reason Rule Form (PTRLREA). |
| Leave Desc: | Describes the Leave Type. |
| Leave Begin Date: | The Leave Begin Date will initially contain the requested start date of a leave and will be updated to contain the actual start date upon approval. The information will be entered into the Approved Leave Begin field on Employee Leave of Absence Form (PZAELOA) in Banner. |
| Leave End Date: | The Leave End Date will initially contain the requested end date of a leave and will be updated to contain the actual end date upon approval. The information will be entered into the Approved Leave End field on Employee Leave of Absence Form (PZAELOA) in Banner. |
| Expected Return Date: | This is the expected date of return from leave. |
| Actual Return Date: | Date field that tracks the Actual Return Date from leave. |
| Percent of Leave: | This field reflects the percentage of time that the employee will be granted leave from his/her job. |
| Last Day of Work: | Date field that tracks the Last Day of Work of the employee in his/her job. |
| Last Day in Pay Status: | Date field that tracks the Last Day in Pay Status of the employee in his/her job. |

| Approvals | | | | | | | |
|----------------------------|--|----------------------------|--|---------------------------|--|---------------------------------|--|
| Department Approval | | College/VC Approval | | Home Dept Approval | | Home College/VP Approval | |
| Name | | Name | | Name | | Name | |
| Department | | College | | Dept | | College | |
| Phone | | Phone | | Phone | | Phone | |
| Email | | Email | | Email | | Email | |
| Date Approved | | Date Approved | | Date Approved | | Date Approved | |
| Approver Comments | | Approver Comments | | Approver Comments | | Approver Comments | |

