

California Management Information System

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Introduction

The California Chancellor's Office has instructed the Community College Districts (CCD) to comply with specific reporting requirements as part of their Management Information System (MIS). The MIS module provides the ability to extract and decode (where necessary) specific employee demographic and job assignment data in a predefined file format. Data for this file is extracted from Banner Human Resources and Banner Student Systems. The system then utilizes this data to produce required reports.

Forms Supporting MIS

The MIS module is supported by the following forms.

Validation Forms

District/Division Code Validation Form	GTVDICD
EEO Contract Group Validation Form	PTVEEOG
Employee Group Code Validation Form	PTVEGRP
Job Activity Code Validation Form	PTVJACT
Job Change Type Validation Form	PTVJCTY
Citizen Type Code Validation Form	STVCITZ
College Code Validation Form	STVCOLL
Disability Type Code Validation Form	STVDISA
Ethnic Code Validation Form	STVETHN
Medical Code Validation Form	STVMEDI
Term Code Validation Form	STVTERM

Rule Forms

Position Class Rule Form	NTRPCLS
Earnings Code Rule Form	PTREARN
Employee Class Rule Form	PTRECLS
Installation Rule Form	PTRINST
Job Change Reason Code Rule Form	PTRJCRE
Projected Statistics Annual Salary Rule Form	PTRPSAS
Statistics Annual Salary Calculation Rule Form	PTRSTAN

Application Forms

Employee Demographic Extract Form	PDADEMO
Employee Assignment Extract Form	PDAASGN
Employee Form	PEAEMPL
Employee Statistics Annual Salary Query Form	PEISTAN
Identification Form	PPAIDEN
Faculty Assignment Form	SIAASGN
Faculty Leave Assignment Form	SIALVAS

Validation Forms

The MIS module is supported by the following validation forms:

District/Division Code Validation Form	GTVDICD
EEO Contract Group Validation Form	PTVEEOG
Employee Group Code Validation Form	PTVEGRP
Job Change Type Validation Form	PTVJCTY
Citizen Type Code Validation Form	STVCITZ
College Code Validation Form	STVCOLL
Disability Type Code Validation Form	STVDISA
Ethnic Code Validation Form	STVETHN
Medical Code Validation Form	STVMEDI
Term Code Validation Form	STVTERM

A description of each validation form appears on the pages that follow.

District Division Code Validation Form (GTVDICD)

The District/Division Code Validation Form establishes state-assigned district codes.

EEO Contract Group Validation Form (PTVEEOG)

The EEO Contract Group Validation Form contains Equal Employment Opportunity (EEO) contract group codes as defined by the U.S. federal government. You must enter one of these values on the Employee Class Rule Form (PTRECLS) at the Regulatory Information window's **EEO Contract Group** prompt.

This form is delivered to you with the basic EEO skill codes required for federal reporting purposes.

Employee Group Code Validation Form (PTVEGRP)

The Employee Group Code Validation Form enables you to define employee group codes and descriptions. The codes created on this form are used to validate entries made to the **Employee Group** field on the Employee Class Rule Form (PTRECLS) and on the Employee Form (PEAEMPL).

Job Change Type Code Validation Form (PTVJCTY)

The Job Change Type Code Validation Form enables you to define job change type codes. The codes you create on this form are used to validate values entered at the **Job Change Type** field on the Job Change Reason Rule Form (PTRJCRE).

Citizen Type Code Validation Form (STVCITZ)

The Citizen Type Code Validation Form enables you to maintain citizen type codes for use on the Identification Form (PPAIDEN). A checked **Citizen Ind** checkbox indicates that a person with this code is a citizen of the country where your institution is located. Because of the requirements of IPEDS reporting, if you are a higher education user, you must check only one citizen indicator checkbox. (See *IPEDS Procedures* in Chapter 6, *Processing of the Human Resources User Guide* for further details.)

Note: The STVCITZ form is shared with other systems and might be modified by non-HR users. Higher education users should, therefore, insure that only one check mark appears in the **Citizen Ind** field before running any IPEDS reports.

College Code Validation Form (STV COLL)

The College Code Validation Form is used to create, update, insert, and delete college codes, for example, College of Engineering, College of Law, College of Music, etc. Several other forms use this form to validate college codes. The user may only create or update college codes from this form.

For CA-MIS Reporting, enter the District Code for each college entry. This value is used in the Employee Assignment Extract Process (PEPAEXT).

For more details, refer to Chapter 3, *Validation Forms*, of the *Human Resources User Guide*.

Disability Type Code Validation Form (STVDISA)

The Disability Type Code Validation Form (STVDISA) allows you to create, update, insert delete disability type codes (i.e., blind, Multiple Sclerosis, Hearing Impaired, etc.). The codes defined on this form are entered on the General Medical Information Form (GOAMEDI). This form is shared with other Banner systems.

Ethnic Code Validation Form (STVETHN)

This form allows you to create, update, insert, and delete ethnic codes (i.e., Asian, Caucasian, etc.) This form is shared with other Banner systems.

Medical Code Validation Form (STVMEDI)

The Medical Code Validation Form enables you define codes that identify and describe medical conditions. The codes defined on this form are entered on the General Medical Information Form (GOAMEDI). This form is shared with the other Banner systems.

Term Code Validation Form (STVTERM)

This form allows you to create, update, insert, and delete term codes. Term codes must be numeric and in the format YYYYTT, and the codes must be constructed so that they maintain the appropriate sequence of terms.

Rule Forms

This section provides detailed instructions for the use of each MIS rule form.

The MIS module is supported by the following rule forms:

Earnings Code Rule Form	PTREARN
Employee Class Rule Form	PTRECLS
Job Change Reason Code Rule Form	PTRJCRE
Projected Statistics Annual Salary Rule Form	PTRPSAS
Statistics Earnings History Rule Form	PTRSEHS
Statistics Annual Salary Calculation Rule Form	PTRSTAN

Banner Human Resources is a highly integrated system. Therefore, *you must complete your rule forms in a specific order*. If you try to build a rule form without first completing the prerequisites, the values for some required fields will be undefined. SCT recommends that you complete your rule forms in the order specified in Chapter 4, *Rule Forms*.

Position Class Rule Form (NTRPCLS)

The Position Class Rule Form enables you to create a position class and associate it with salary guidelines, employee class, and employee skill level. The salary guidelines you define on this form default to the Position Form (NBAPOSN) and the Employee Job Form (NBAJOBS).

For CA-MIS reporting, the Employee Skill Code value is used by the Employee Demographic Extract Process (PEPEDEX).

For more details regarding the usage of this form, please refer to Chapter 4, *Rule Forms* of the *Human Resources User Guide*.

Earnings Code Rule Form (PTREARN)

The Earnings Code Rule Form enables you to create earnings codes and associate them with rules. The earnings code identifies the nature of the pay (for example, regular or holiday) and establishes the rules governing the time entry validation and processing of earnings represented by this code. This form can also be used to instruct the system to override labor distribution rules when it encounters this code. For detailed instructions on the use of the PTREARN form, refer to Chapter 4, *Rule Forms*.

All instructions for establishing earnings code rules for CA MIS are identical with those described in Chapter 4. You should, however, note that, for CA MIS, checking the **Stipend?** checkbox (in the Earn Code Attributes block) causes the earnings to be reported as a stipend in the extract process (As described in Chapter 4, you must check this checkbox if the earnings code represents a stipend, that is, earnings exceeding base salary), and checking the **CA-MIS Additional Earnings** check box in the Regulatory Information window of PTREARN identifies the earn codes that are to be included in the calculation of the annual salary by the PEPCAL process.

Longevity, shift differential and other earn codes that are not defined as stipends on PTREARN can also be included in the calculation of the annual salary.

Note: If shift differential is not set up as a premium pay it will not be added for the calculation of the annual salary. However, you can indicate this earn code as an additional earning by selecting the **CA-MIS Additional Earnings** check box.

Employee Class Rule Form (PTRECLS)

The Employee Class Rule Form enables you to create an employee class and associate it with earnings codes, a leave category, and a benefit category. You must define employee class codes with this form before completing the employee Information Form (PEAEMPL). For detailed instructions on the use of the PTRECLS form, refer to Chapter 4, *Rule Forms*.

All instructions for establishing employee classes for CA MIS are identical with those described in Chapter 4. If, however, your site is a member of the California Community College System, you must observe one additional rule when entering the **Employee Group** field (in the Employee Defaults block). In this case, you must enter a California Management Information System Employee-Employment-Classification code in this field.

The current CA-MIS valid values include the following:

<i>Code</i>	<i>Description</i>
T	Academic, temporary, non-tenure track
C	Academic, contract (1st through 4th year): tenure track
R	Academic, regular: tenured
A	Educational administrator
P	Classified, permanent/probationary

Note: SCT does not provide or update these values.

Installation Rule Form (PTRINST)

The Installation Rule Form enables you to identify rules that apply throughout your installation and establish them in the database at an installation level.

The Main window collects payroll, regulatory, finance interface, and security activation rules.

For CA-MIS reporting, enter the **District/Division** Code on the CA Pension/MIS window for your institution.

Note: For additional information on the use of this form, refer to Chapter 5, *Security of the Human Resources User Guide*.

Job Location Rule Form (PTRJBLN)

The Job/Hiring Location Rule Form establishes job location codes for use on the Employee Jobs Form (NBAJOBS) and the Employee Form (PEAEMPL).

In the **District Code** field, specify the CA-MIS district code for each job location, where appropriate. You can override the job location at the position level via NBAPOSN or at the employee level via NBAJOBS. This enables the Job Assignment Extract Process (PEPAEXT) track the CA-MIS District codes for each job assignment for an employee from NBAJOBS.

Job Change Reason Code Rule Form (PTRJCRE)

The Job Change Reason Code Rule Form establishes codes and descriptions for changes in job status and/or salary. For a detailed description of the use of this form, refer to Chapter 4, *Rule Forms*.

The Job Type Codes associated with Job Change Reason Codes are evaluated and reported during the Job Assignment Extract Process (PEPAEXT).

Projected Statistics Annual Salary Rule Form (PTRPSAS)

The Projected Statistics Annual Salary Rule Form enables the Employee Statistics Annual Salary Process (PEPCSAL) to calculate the Projected Stats Annual Salary. Projections based on pending negotiations are also flagged. Results from this calculation can be viewed on Employee Statistics Annual Salary Inquiry Form (PEISTAN).

For a detailed description of the use of this form, refer to Chapter 4, *Rule Forms*.

Statistics Earnings History Rule Form (PTRSEHS)

The Statistics Earnings History Rule Form enables you to define earnings codes which should be excluded in the reporting of Assignment Total Hours and Assignment Total Payment during the extract process. For a detailed description of the use of this form, refer to Chapter 4, *Rule Forms*.

Statistics Annual Salary Calculation Rule Form (PTRSTAN)

The Statistics Annual Salary Calculation Form enables you to define the factors used at your site in calculating total annual salary. Once these rules are defined, you can calculate (and view) the total annual salary of individual employees when the employee has more than one job.

Factors affecting the salary calculation include types of positions (primary, secondary, overload), differing job statuses (leave with pay, leave without pay, leave with partial pay), and the flexibility Banner HR provides users in entering annualized (full-time, twelve month) or annual (actual annual salaries expected to be earned) in the **Annual Salary** field of the Job Block of NBAJOBS.

Rules established in this form will affect the values that appear on the Employee Statistics Annual Salary Query Form (PEISTAN), after running the PEPCAL process.

For a detailed description of the use of the PTRSTAN Form, refer to Chapter 4, *Rule Forms*.

Application Forms

The MIS module is supported by the following application forms:

Employee Demographic Extract Form	PDADEMO
Employee Assignment Extract Form	PDAASGN
Employee Form	PEAEMPL
Employee Statistics Annual Salary Inquiry Form	PEISTAN
Faculty Assignment Form	SIAASGN
Faculty Leave Assignment Form	SIALVAS

A description of each form follows.

Employee Demographic Extract Form (PDADEMO)

The Employee Demographic Extract Entry Form allows you to review the data after running the PEPEDEX process *without* creating the magnetic tape file (by setting the report parameter *Create Tape* to 'N'). This form displays every field required for CA-MIS reporting purposes.

Access this form via Direct Access. A blank form with no Key block is displayed. To view data extracted by the PEPEDEX process, query one or more fields of PDADEMO. You can now add new records, edit data on existing records, duplicate records, delete records and save changes made to the extracted records.

Records that you modify and save will display your Banner **User ID** and the **Activity Date**. Records that have *not* been modified will display the name of the extract process, PEPEDEX, and the **Activity Date**.

Note: To make changes to a record that has already been reported, (i.e., a record whose **Report Indicator** is checked), select the Duplicate function. The system creates a new record with identical data, except for the **Report Indicator** field which will be unchecked. Modify and save changes made to the duplicate record. The changes will be taken into account during the next extract process run for the new report identifier.

All extracted data and data modified on PDADEMO are maintained and stored in the PERDEMO table.

All fields on PDADEMO are enterable unless specified otherwise.

Fields	Descriptions / Buttons
Report ID	Report Identifier generated for the tape when the Create Tape process of PEPEDEX is completed.
Employee ID	Employee's Banner ID.
Last Name	Employee's Last Name from the Identification Form (PPAIDEN). This field is not reported on the tape file, and is used for sorting purposes only.
First Name	Employee's First Name as per the Identification Form (PPAIDEN). This field is not reported on the tape file, and is used for sorting purposes only.

Fields	Descriptions / Buttons
DOB	Employee's Date of Birth from the Identification Form (PPAIDEN)
Gender	Employee's gender as entered on the Identification Form (PPAIDEN)
Ethnicity	Employee's ethnic origin as entered on the Identification Form (PPAIDEN).
Citizenship	Employee's citizenship status. (lookup) List Citizen Type Code Validation Form (STVCITZ)
Disability	Disability status of the employee, if any as indicated on (GOAMEDI).
EEO6 Occ. Act	Employee's EEO6 Occupation Activity code. (lookup) List EEO Skill Code Validation Form (PTVESKL)
Empl. Class	Employee's Employment Classification Code. (lookup) List Employee Form (PEAEMPL)
Empl. Status	Employee's Employment Status. (lookup) List Job Change Reason Code Rule Form (PTRJCRE)
Cont. Duration	Employee's contract duration. (lookup) List EEO Contract Group Validation Form (PTVEEOG)
Annual Salary	Employee's annual salary. This field is calculated from PEPCAL.
Stipend	Employee's stipend (Sum of earn codes marked as stipend earnings).
User ID	By Default displays the Extract process, PEPEDEX. If a record has been modified on PDADEMO, the User ID of the employee modifying the extracted record is displayed. Display only.

Fields	Descriptions / Buttons
Activity Date	Date on which the change was last recorded. Display only.
Report Ind.	Indicates that the record has been written to a tape file previously. This field will be checked for records that have been previously reported. Display only.

Note: To modify a record previously reported refer to the note on the duplicate record functionality described on *page A-11*.

Note: Modifying any of the fields in PDADEMO will not update the same in the relevant Banner source forms. For example, changing an employee's Disability status on PDADEMO will not automatically change the same for the employee on the GOAMEDI form, as these fields are maintained in a separate Banner table, PERDEMO.

Employee Assignment Extract Entry Form(PDAASGN)

The functionality of the Employee Assignment Extract Form (PDAASGN) is identical to that of PDADEMO. The only difference being, this online form displays data extracted by the PEPAEXT process.

Note: All fields are data entry fields, unless specified.

Fields	Descriptions / Buttons
Report ID	Report identifier generated for the tape when the Create Tape process of PEPAEXT is completed.
Employee ID	Employee's Banner ID.
Last Name	Employee's Last Name from the Identification Form (PPAIDEN)
First Name	Employee's First Name as per the Identification Form (PPAIDEN)
District ID	The associated CA-MIS District Code.
Asgn. Type	The type of job assignment undertaken by the employee.

Fields	Descriptions / Buttons
Asgn. Leave Status	The employee's leave status corresponding to his/her job assignment.
Asgn. Acct. Code	Account Code associated with the job assignment.
Weekly Hours	Hours per week allocated for the job assignment.
Hourly Rate	The hourly rate associated with the job assignment.
FTE	Full-time equivalent expressed as a percentage as associated with each employee assignment.
Report Date	Date entered for the Current Report As Of Date report parameter.
Source	Identifies the table source for the MIS data element. <ol style="list-style-type: none"> 1 Instructional faculty from the SIRASGN table 2 Non-instructional faculty from the SIRNIST table 3 Instructional faculty leave from the SIRLVAS table 4 Non-instructional faculty leave from the SIRNLVA table 5 Non-faculty employees
Position	Displays the employee's position entered on NBAJOBS to uniquely identify the job assignment.
Suffix	Displays the suffix associated with a position to uniquely identify a job assignment on NBAJOBS
Position Status	Displays the status of the position.
Effective Date	Displays the effective date specified for the position on NBAJOBS.
Course Reference Number (CRN)	Displays the Course Reference Number associated with the position/suffix combination entered on the Faculty Assignment Form (SIAASGN) or the Faculty Leave Assignment Form (SIALVAS).

Fields	Descriptions / Buttons
Term Code	Displays the Term Code associated with the Course Reference Number as specified on the Faculty Assignment Form (SIAASGN) or the Faculty Leave Assignment Form (SIALVAS).
Category	Displays the session code associated with the Course Reference Number on the Faculty Assignment Form (SIAASGN) or the Faculty Leave Assignment Form (SIALVAS).
Non-Instructional Type (NIST) Code	Displays the non-instructional type code associated with the employee.
College Code	Displays the college code associated with the non-instructional employee's job assignment.
Department Code	Displays the Department code associated with the non-instructional employee's job assignment.
User ID	Displays the PEPEDEx extract process by default. If a record has been modified on PDADEMO, the User ID of the employee modifying the extracted record is displayed. Display only.
Activity Date	Date on which the last change was recorded. Display only.
Report Ind.	Indicates that the record has been written to a tape file previously. This field will be checked for records that have been previously reported. Display only. To modify a record previously reported please refer to the note on the Duplicate record functionality described on <i>page A-11</i> .

Employee Form (PEAEMPL)

The Employee Form establishes information about an employee's terms of employment. (It does not include biographic/demographic data, which is entered on PPAIDEN.) You must complete this form before assigning a position to the employee on NBAJOBS.

The Main window collects general data, including current status, employee class, leave and benefit categories, home and distribution organizations, and up to four service dates.

For CA-MIS reporting, you must enter the **Employee Group** field.

For descriptions of all of the other windows that constitute the PEAEMPL form, refer to Chapter 10, *Employment Administration*.

Employee Statistics Annual Salary Inquiry Form (PEISTAN)

The Employee Statistics Annual Salary Inquiry Form (PEISTAN) enables you to query, by Employee ID, the calculated Stats Annual Salary as of the last time the Calculate Stats Salary (PEPCSAL) report was run to update the Stats Annual Salary.

Faculty Assignment Form (SIAASGN)

This form is used to enter and maintain instructional and non-instructional assignment information for a term, for a faculty or advisor. Ensure that you specify the Position, Suffix and the Assignment Type fields which are used by the extract processes. For more details refer to *Chapter 8, Faculty Load* in *Using SCT Banner Student*.

Faculty Leave Assignment Form (SIALVAS)

This form allows institutions to track instructional and non-instructional assignments allocated to faculty members for a term had they not been on leave for that term. For more details refer to *Chapter 8, Faculty Load* in *Using SCT Banner Student*.

Reports and Processes

The following processes need to be run for CA-MIS:

Calculate Statistics Salary Process	PEPCSAL
Employee Assignment Extract Process	PEPAEXT
Employee Demographic Extract Process	PEPEDEX

Two types of information are reported to the CA-MIS authorities:

- Employee demographics at your institution via the PEPEDEX process and
- Employee job assignment information via PEPAEXT process

Note: Always run the PEPCSAL process prior to the PEPEDEX process. The PEPCSAL process provides updated salary information for CA-MIS reporting. This information is a required component for the PEPEDEX extract.

Set Up for Running the PEPCSAL process

Set up the following rule forms before you run the PEPCSAL process:

1. Establish rules on the Projected Statistics Annual Salary Rule Form (PTRPSAS) for calculating the projected salary based on salary groups as follows:
 - (a) At **Calculate Using Salary Group**, enter the salary group code to be used for report calculations.
 - (b) At **Salary Table**, select a salary table code from the drop-down list.
 - (c) Enter the number of **Steps to Increase/Decrease** an employee's salary.
 - (d) At **Increase/Decrease Percent**, enter the percentage by which an employee's salary is to increase or decrease if the salary step is zero (0).
 - (e) At **Increase/Decrease Amount**, enter the amount by which an employee's salary is to increase or decrease if the salary step is zero (0).
 - (f) Mark the **Pending Negotiation?** check box if the employee's salary is subject to pending negotiations.
 - (g) At **Rounding Method**, specify the method to be used to round off the salary amounts.

- (h) At **Rounding Amount**, specify if the coverage amount should be rounded off to the nearest hundred (100.00) or the nearest thousand (1000.00).
 - (i) Save. The **Activity Date** is displayed.
2. Establish factors which influence calculation of the total annual salary at your site on the Statistics Annual Salary Rule Form (PTRSTAN) for each Employee Class. Factors include:
- Flexibility in entering annualized or annual salaries on NBAJOBS.
 - Position Types (primary, secondary and overload)
 - Varying job statuses (leave with pay, leave without pay, leave with partial pay)

To use this form,

- (a) At **Employee Class**, enter the employee class for which the salary calculation rule is being defined.
 - (b) Mark the **Primary Jobs** check box if you wish to include primary jobs.
 - (c) Mark the **Secondary Jobs** check box if you wish to include secondary jobs.
 - (d) Mark the **Overload Jobs** check box if you wish to include overload jobs.
 - (e) At **Calculation Source**, select the appropriate salary calculation method from the pull-down list.
 - (f) Select the calculation method to be used for employees with leave status:
 - **On Leave with Partial Pay**
 - **On Leave with Full Pay**
 - **On Leave with No Pay**
 - (g) Save. The system updates and displays the **Activity Date**.
 - (h) After specifying rules on the main window, select the Excluded Suffixes window from the Options menu to specify job suffixes you wish to exclude while calculating the annual salary, if any.
 - (i) Save the excluded job suffixes. The system updates the **Activity Date**.
3. Run the PEPCAL process by specifying appropriate report parameters. The process populates the PERSTAN table.
4. After running the process, view, query or update the data extracted for employees individually via the online entry form, Employee Statistics Annual Salary Inquiry Form (PEISTAN).

Note: For more details, refer to the report parameters and report field descriptions and layouts in the following pages.

Set up for PEPAEXT Process

Establish appropriate field information in the following Banner forms before you run the PEPAEXT extract process.

1. Establish valid assignment type codes used for CA-MIS reporting on the Assignment Type Code Validation Form (STVASTY).

Note: The extract process will not validate the values from this form.

2. Specify appropriate data on the Faculty Assignment Form (SIAASGN) if the faculty member is active in an assignment. Otherwise, add or update data for faculty on leave using the Faculty Leave Assignment Form (SIALVAS). The information from both the forms will be extracted by the process for all *faculty* staff members. *Non-faculty* information is extracted based on information in the Employee Jobs Form (NBAJOBS).

The following pages contain descriptions of these processes and provide a sample of a report where appropriate.

Calculate Statistics Salary (PEPCSAL)

Description The PEPCSAL process calculates the annual salary statistics. It also calculates an employee's annual salary for primary and secondary jobs by including premium earnings, shift differential earnings or any other additional earnings. From the earn codes listed for each employee in the Default Earnings window on NBAJOBS, the process includes only those that are marked as Additional Earnings and/or Premium Earnings on the Earnings Code Rule Form (PTREARN).

Warning: Exercise caution if you include Premium earnings and Additional earnings in the calculation of the annual salary, as it is possible that earnings may get duplicated and result in an inflated annual salary.

Parameters	Name	Description/Values	Required	Default	Validation
01	Calculate Statistics Annual Salary As Of	Date from which annual salary statistics are calculated.	No	Sysdate	Format must be DD-MMM-YYYY or DD-MMM-YY
02	Calculate Projected Statistics Annual Salary	Code indicating whether to Calculate Projected Statistics for the Annual Salary. Y Previously calculated values will be deleted prior to the update/insertion of newly calculated values. N Projected Statistics are not calculated for the Annual Salary.	No	Y	None
03	Calculate Projected Statistics As Of	Date from which to Calculate the Projected Statistics for the Annual Salary	No	Sysdate	Format must be DD-MMM-YYYY or DD-MMM-YY

Parameters	<i>Name</i>	<i>Description/Values</i>	<i>Required</i>	<i>Default</i>	<i>Validation</i>
04	Delete Projected Statistics Annual Salaries	Code indicating the deletes associated with Projected Statistics Annual Salaries. Select: Y Delete all data associated with the Projected Statistics Annual Salaries. N Do not delete the data associated with the Projected Statistics Annual Salaries.	No	N	Format must be Y or N
05	Include Longevity Amount	Indicate if the process is to calculate and include the longevity pay.	Yes	N	None
06	Include Premium Earnings	Specify if premium earnings are to be considered in the calculation of the annual salary.	No	N	Y or N
07	Include Additional Earnings	Specify if earn codes marked as Additional earnings on PTREARN are to be considered in the calculation of the annual salary.	No	N	Y or N
08	Include Shift Differential	Specify if shift differential earn codes are to be included in the calculation of the annual salary.	No	N	Y or N

Sort Order Not applicable

Data Source NBAJOBS PEISTAN PTRPSAS
 PTRSTAN PTREARN PPAIDEN

Frequency On demand

Output Standardized horizontal report format

Fields	<i>Name</i>	<i>Description</i>
	ID	ID number of employee for whom required salary data is provided.
	Name	Name of the employee for whom required salary data is provided.
	Annual Salary	The annual salary of the employees listed in this report.
	Annual Salary Date	The annual salary date of the salaries listed in this report.
	Projected Salary	The projected salary for this employee at the future date listed on this report.
	Projected Salary Date	The future date of the projected salary.
	Pending Nego. Ind.	Pending negotiations indicator shows whether the projected salaries are affected by pending negotiations with a union. If the indicator is Y, then the new salary would be subject to approval by the union.

Report Sample—Calculate Statistics Salary Process Report (PEPCSAL)

27-OCT-2003 14:52:57		SCT Banner University				PAGE 1	
		Calculate Statistics Salary				PEPCSAL	
* Indicates New Step Not Found or Out of Range for This ID.							
ID	Name	Annual Salary	Annual Salary Date	Projected Salary	Projected Salary Date	Pending	Nego Ind
123456987	Bernard Nevermind MH	80300.00	01-JAN-2002	80300.00	31-DEC-2002		
BB0000020	Adam Abner	135766.21	01-JAN-2002	135766.21	31-DEC-2002		
091000000	Abigail Abbey	60000.00	01-JAN-2002	63000.00	31-DEC-2002		Y
131000001	Brian Abbey	34319.40	01-JAN-2002	34319.40	31-DEC-2002		
610009711	James Abbot	63000.00	01-JAN-2002	63000.00	31-DEC-2002		
511333333	Margaret Abercrombie	83250.00	01-JAN-2002	83250.00	31-DEC-2002		
109900001	Cathryn Able	74925.00	01-JAN-2002	77175.00	31-DEC-2002		N
109900002	Fred Able	83250.00	01-JAN-2002	85750.00	31-DEC-2002		N
JCCA99999	Ione Acar	60000.00	01-JAN-2002	60000.00	31-DEC-2002		
WE0000050	Amy Ace	63000.00	01-JAN-2002	63000.00	31-DEC-2002		
200000001	Linda Adam	85085.44	01-JAN-2002	87640.00	31-DEC-2002		N
CD0000034	April Adams	101325.00	01-JAN-2002	101325.00	31-DEC-2002		
CD0000026	Ashley Adams	26543.76	01-JAN-2002	26543.76	31-DEC-2002		
JCCA22222	Bernard Adams	1247976.00	01-JAN-2002	1247976.00	31-DEC-2002		
121000001	Bill Adams	83250.00	01-JAN-2002	83250.00	31-DEC-2002		
BC000JOB2	James Adams	78750.00	01-JAN-2002	78750.00	31-DEC-2002		
WE0000011	James Adams	152762.50	01-JAN-2002	152762.50	31-DEC-2002		
CD0009557	Jamie Adams	11465.76	01-JAN-2002	11465.76	31-DEC-2002		
LAURA0035	Joey Adams	50000.00	01-JAN-2002	50000.00	31-DEC-2002		
CD0000031	Kayla Adams	86625.00	01-JAN-2002	86625.00	31-DEC-2002		
CD0000032	Kyle Adams	14248.00	01-JAN-2002	14248.00	31-DEC-2002		
CD0000000	Mary Adams	25115.52	01-JAN-2002	.00	31-DEC-2002		
AP0000006	Michael Adams	3288.00	01-JAN-2002	3288.00	31-DEC-2002		
CD0000115	Shane Adams	94350.00	01-JAN-2002	105010.00	31-DEC-2002		N
CD0000027	Tony Adams	10919.76	01-JAN-2002	10919.76	31-DEC-2002		
CD0000033	Vaughn Adams	93450.00	01-JAN-2002	93450.00	31-DEC-2002		
529000001	William Adams	78750.00	01-JAN-2002	78750.00	31-DEC-2002		

27-OCT-2003
14:52:57

SCT Banner University

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Calculate Statistics Salary

PEPCAL

* * * REPORT CONTROL INFORMATION * * *

Report Name: PEPCAL

Calculate Stats Annual Salary As of: 01-JAN-2002
Calculate Projected Stats Annual Salary: Y
Calculate Projected Stats Annual Salary As of: 31-DEC-2002
Delete Projected Stats Annual Salaries: N
Calculate Longevity Amount: Y
Include Premium Earnings: N
Include Additional Earnings: N
Include Shift Differential Earnings: N

Employee Assignment Extract Process (PEPAEXT)

Description The PEPAEXT extract process generates job assignment data of faculty and non-faculty staff members that is submitted to the California Management Information System (MIS) as a magnetic tape file. The extract process also generates a hard copy report.

Parameters	Name	Description/Values	Required?	Default	Validation
01	From Term Code	Beginning term code.	Yes, for Fall collection only.	None	STVTERM
02	To Term Code	Ending term code.	Yes, for Fall collection only.	None	STVTERM
03	Prior Report as of Date	Date on which the report was last submitted	No		DD-MON-YYYY
04	Current Report as of Date	Date on which the current report is being submitted	Yes	None	DD-MON-YYYY
05	Term Identifier	Term Identifier. Enter in the format YYT: YY Last two digits of the year in which the term occurs T Single digit term type identifier.	Yes	None	YYT Format
06	Report Identifier	An alpha numeric ID to identify the report	Yes	None	None

Parameters	Name	Description/Values	Required?	Default	Validation
07	Create Data	Indicate if you would like to include any new or changed data since the last process run.	Yes	No	None
		Note: It is recommended that you use this parameter only for the <i>initial</i> extract.			
08	Create Tape	Specify if the tape file is to be created by the extract process.	Yes	No	None

Sort Order By District or Division, followed by alphabetical listing by employee's last name

Data Source SIAASGN SIALVAS STVTERM PEAEMPL
STVETHN STVCITZ PPAIDEN NBAPOSN
NBAJOBS GOAMEDI NTRPCLS PTRECLS

Frequency On demand. Required for Fall and Term End collections.

Output Standard horizontal format, Tape File

Fields	Name	Description
	Term ID	This field is the value specified for the report parameter, <i>Term Identifier</i> . Prints the term ID in the report header for which the data is being captured by the process.
	Report ID	Prints the Report ID in the report header for which the data is being captured by the process.

Fields	Name	Description
	District/Division	<p>District or Division to which the educational institution is associated. This information is printed on the report header.</p> <p>For <i>non-faculty</i> members, this information is drawn from the Employee Jobs Form (NBAJOBS).</p>
	ID	Employee's ID
	Last Name	Employee's Last Name
	First Name	Employee's First Name
	Asgn. Type (EJ01)	<p>A 2-character code identifying the employee's job assignment type. The first character identifies whether the assignment is instructional (C or N) or non-instructional (A). The second character identifies the nature of the assignment when the assignment is non-regular.</p> <p>For <i>faculty</i> members, assignment type data is extracted from SIAASGN and the SIALVAS forms.</p> <p>For <i>non-faculty</i> employees, the 2-character alphanumeric value of this MIS element is evaluated as follows:</p> <p>The <i>first</i> character of the Assignment Type data element (EJ01) is derived from the value of the MIS Occ Code specified for a corresponding EEO Skill Code on the PTVESKL form.</p> <p>The <i>second</i> character of this element represents the job status of the relevant position, and is derived from NBAJOBS as follows:</p> <ul style="list-style-type: none"> • If the job status is 'Active', an 'N' is printed in the second position. • If the job status is 'Leave', (includes all leave combinations), the process prints an 'L' in the second position. • If the job status is 'Terminated', the process prints an 'N' in the second position, and the following message is displayed in the log file: <i>*WARNING*: Job status is terminated.</i>

Fields	Name	Description
	Asgn. Leave (EJ02)	<p>Employee's leave status associated with the job assignment. The third character of the Assignment Type code indicates the leave status of the employee.</p> <p>For all faculty members, this character is extracted from the Asty. Type field on the Faculty Assignment Form (SIAASGN) and the Faculty Leave Assignment Form (SIALVAS).</p> <p>For <i>non-faculty</i> members this information is extracted from the Job Change Type associated with the Job change reason on the Employee Jobs Form (NBAJOBS).</p>
	Asgn. Acct. (EJ03)	<p>Refers to the category code or the Job Activity code associated with the job assignment.</p> <p>For <i>faculty</i> employees, it refers to the TOPS code associated with the assignment on Faculty Assignment Form (SIAASGN) and Faculty Leave Assignment Form (SIALVAS).</p> <p>Note: TOPS codes are defined on the Course Detail Information Form (SCADETL).</p> <p>For <i>non-faculty</i> employees, the account code is obtained for each position/suffix combination on NBAJOBS as follows:</p> <p>When <i>Banner Finance</i> is installed, the process considers the value of the Program Code field in the FOAPAL distribution for each position/suffix combination on NBAJOBS.</p> <p>When Banner Finance is <i>not</i> installed, this MIS element will not be reported.</p>

Fields	Name	Description
	Asgn. Wkly. Hrs. (EJ04)	<p>This is a calculated field required for the Fall report only.</p> <p>For <i>faculty</i> members, the average number of hours spent on an assignment is calculated via the SIAASGN and SIALVAS forms. The term equivalent weekly faculty contact hours is calculated for instructors who teach an irregular number of hours.</p> <p>For <i>non-faculty</i> employees, the weekly hours in the Fall collection report is calculated from the fields on NBAJOBS using the following formula: Hours per Day x Appt.% x 5</p>
	Asgn. Hrly. Rate (EJ05)	<p>Prints an single hourly rate per district/division, job activity and assignment for employees paid on an hourly basis (from NBAJOBS).</p> <p>If the employee is being paid on a non-hourly basis, the process prints 00000.</p> <p>For individuals paid hourly with more than one hourly rate, an average is determined.</p> <p>For faculty members with multiple assignments, the hourly rate is a weighted average obtained by applying the workload factor from the Banner Student system.</p>
	Asgn. FTE (EJ08)	<p>The Full Time Equivalent (FTE) expressed as a percentage associated with each assignment for the employee being reported. Required for the Fall term only.</p> <p>This data is determined from the Faculty Assignment Form (SIAASGN) and Faculty Leave Assignment Form (SIALVAS) for instructional and non-instructional faculty.</p> <p>For <i>non-faculty</i> employees, the value of this element is derived from the Job FTE field on the Employee Jobs Form (NBAJOBS).</p>

Report Sample - PEPAEXT

REPORT : PEPAEXT		SCT DEVELOPMENT		Page 1		RUN DATE 21-OCT-2002		RUN TIME 01:24 PM	
Version: 5.4.1									
TERM ID 789									
REPORT ID MG120									
DISTRICT/DIVISION 111									
ID	LAST NAME	First Name	Asgn Type	Asgn Leave	Asgn Acct	Asgn Wkly Hrs	Asgn Hrly Rate	ASGN FTE	
710000003	Burns	Linda	AL	L	AC	20	2205	05000	
710000003	Burns	Linda	AL	L	AC	20	2105	05000	
710000004	Campbell	David	CI	Y	AR	40	0000	10000	
710000005	Darcy	Elizabeth	SI	Y	AR	40	0000	10000	
710000006	Garrett	Linda	AL	Y	AR	40	0000	10000	
710000007	Howell	Douglas	CI	Y	PR	40	0000	10000	
710000008	Kieffer	Mark	SI	L	PR	40	0000	10000	
710000009	Lander	Richard	AL	Y	AC	40	0000	10000	
710000010	Preston	Thomas	AL	L	AC	40	0000	10000	

REPORT : PEPAEXT
Version: 5.4.1

SCT DEVELOPMENT

Page 1
RUN DATE 21-OCT-2002
RUN TIME 01:24 PM

* * * REPORT CONTROL INFORMATION * * *

Parameter Name	Value	Source	Message
Parameter Seq No:	961940		
From Term Code	200122	Entered	Entered
To Term Code	200122	Entered	Entered
Prior Report As Of Date	2-NOV-2001	Entered	
Current Report As Of Date	2-NOV-2001	Entered	
Term Identifier	789	Entered	Entered
Report Identifier	MG120	Entered	Entered
Create Tape (Y/N)	Y	Entered	Entered

Total Number of Records Printed: 8

A California Management Information System
Employee Assignment Extract Process (PEPAEXT)

```

Username: Connected

Starting PEPAEXT (Rel 5.4.1)...

*****

Please Enter Parameters for the PEPAEXT Report

*****

Parameter Sequence Number: pepaext completed successfully
76 lines written to /u/jobsub/pepaext_963319.lis

are_parameters_valid YES

Name           ID           ECLS    Status    Message
-----
Liu Christine  , 193500012   03     Active    ** WARNING** Employee Assignment Type is invalid
Liu Christine  , 193500012   03     Active    ** WARNING** Asgn Leave Status is invalid
Smith Joe      , 011252231   02     Active    ** WARNING** Asgn Leave Status is invalid
Connected
Connected

```


Employee Demographic Extract Process (PEPEDEX)

Description The PEPEDEX extract process generates the employee demographic data that is to be submitted to the California Management Information System (MIS) as a magnetic tape file. The extract process also generates hard copy reports.

Parameters	Name	Description/Values	Required?	Default	Validation
01	Reporting Domain	Reporting Domain. Select one: F For the first week of the Fall Term Reporting Domain. T For the Term End Reporting Domain.	Yes	None	F, T
02	From Term Code - Fall Collection	Beginning term code.	Yes, for Fall collection only.	None	STVTERM
03	To Term Code - Fall Collection	Ending term code.	Yes, for Fall collection only.	None	STVTERM
04	Term Code - Term End Collection	Term Code for the entire term.	Yes, for Term collection only.	None	STVTERM
05	Term Identifier	Term Identifier. Enter in the format YYT: YY Last two digits of the year in which the term occurs T Single digit term type identifier.	Yes	None	YYT Format.
06	Prior Report As of Date	Date for which the report was previously generated.	No	None	DD-MMM-YYYY

A California Management Information System
Employee Demographic Extract Process (PEPEDEX)

Parameters	Name	Description/Values	Required?	Default	Validation
07	Current Report As of Date	Date for which the current report is being generated.	Yes	None	DD-MMM-YYYY
08	Report Identifier	Identifier for the current report.	Yes	None	None
09	Prior Report Identifier	ID of a report previously generated. Specify this parameter only if you wish to compare the current report.	Yes, only if you specify Prior Report As Of Date parameter.	None	None
10	Replacement Ethnicity Code	The ethnic code that is to replace for employees that are reported with an unknown ethnic origin.	Yes	None	STVETHN
11	Proj. Statistics Annual Salary	Indicate if the Projected Statistics Annual Salary calculated from the PEPCAL process is to be included.	Yes	Yes	None
12	Create Data	Indicate if you would like to include any new or changed data since the last process run. Note: It is recommended that you use this parameter only for the <i>initial</i> extract.	Yes	No	None
13	Create Tape	Specify if the tape file is to be created by the extract process.	Yes	No	None

Sort Order By District or Division, followed by alphabetical listing by employee's last name

Data Source

PTVJCTY	PEAEMPL	STVTERM	PTREARN
PTRECLS	PEISTAN	STVETHN	STVMEDI
STVCITZ	PPAIDEN	NBAPOSN	GOAMEDI
NBAJOBS	NTRPCLS	PHREARN	NBAFISC
PTRJCRE			

Frequency On demand. Required for Fall and Term End collections.

Output Standard horizontal print format and a magnetic tape file.

Fields	Name	Description
	Term ID	This field is the value specified for the report parameter, <i>Term Identifier</i> . Prints the term for which the data is being captured by the process.
	Report ID	This field is the value specified for the report parameter, <i>Report Identifier</i> . Prints the Report ID for which the data is being captured by the process.
	District/Division	District or Division associated with the educational institution.
	ID	Employee's ID
	Last Name	Employee's last name.
	First Name	Employee's first name.
	EB02	Employee's date of birth in YYYYMMDD format.
	EB03	Employee's sex category (male or female)

Fields	<i>Name</i>	<i>Description</i>
	EB04	Employee's ethnic origin.
	EB05	Employee's citizenship status based on the citizen code entered on the Citizen Type Code Validation Form (STVCITZ).
	EB06	Employee's disability status based on the Primary Disability field on the General Medical Information Form (GOAMEDI).
	EB07	The CA-MIS equivalent code for the employee's EEO occupational category. This value is derived from the equivalent MIS Occ. Code established on the EEO Skill Code Validation Form (PTVESKL).
	EB08	The employment classification code of the employee, based on the Employee Group established on the Employee Form (PEAEMPL).
	EB09	The employment status of the employee as determined by the Job Change Type Indicator associated with the Job Change Reason Code.
	EB11	The CA-MIS equivalent code for the employee's contract group. This value is drawn from the equivalent MIS-EEOG code for a EEO Contract Group on PTVEEOG.
	EB12	Employee's annual salary calculated from the Calculate Statistics Salary Process (PEPCSAL) by including all earn codes that have been classified as an Additional Earning on the PTREARN form. Additional earnings also include shift differential, longevity, and earn codes not identified as stipends on PTREARN, and are listed as default earnings for a job assignment on NBAJOBS that has been paid up to the As of report date.
	EB13	Employee's annual stipend amount rounded to the nearest dollar.

Report Sample

21-OCT-2002		SCT DEVELOPMENT										PAGE 1	
15:29:47		Empl Demographic Extract Proc.										PEPEDEX	
TERM ID: 020													
REPORT ID: 3333													
District/Division: 111													
ID	Last Name	First Name	EB02	EB03	EB04	EB05	EB06	EB07	EB08	EB09	EB11	EB12	EB13
710000003	Burns	Linda	19590228	F	1	N	2	1	T	1	2	050000	008000
710000004	Campbell	David	19510110	M	1	C	2	5	A	1	2	045000	002000
710000005	Darcy	Elizabeth	19490503	F	2	N	2	4	C	1	2	070000	000000
710000006	Garrett	Linda	19350501	F	1	N	2	1	R	1	2	039000	003000
710000007	Howell	Douglas	19740827	M	1	C	2	5	C	1	2	043000	005000
710000008	Kieffer	Mark	19701109	M	2	C	2	4	A	1	2	062000	000000
710000009	Lander	Richard	19701109	M	2	N	2	1	R	1	2	057000	000000
710000010	Preston	Thomas	19700522	M	1	N	2	1	C	1	2	047000	002500

21-OCT-2002
15:29:48

SCT DEVELOPMENT

PAGE 1

Empl Demographic Extract Proc.

* * * REPORT CONTROL INFORMATION * * *

ERRORS EXISTS -View .log file for more details.

RPTNAME: PEPEDEX
Reporting Domain: F
From Term Code-Fall Collection: 200124
To Term Code-Fall Collection: 200124
Term Identifier: 020
Current Reporting Date: 21-OCT-2002
Prior Period Reporting Date: 31-DEC-2001
Report Identifier: 33333
Prior Report Identifier: 22222
Replacement Ethnicity Code: 1
Create Tape File: Y

HR EXTRACT RECORDS OUT: 9

*A California Management Information System
Employee Demographic Extract Process (PEPEDEX)*

Username: Connected.

Starting PEPEDEX (Rel. 5.4.1)...

Parameter Sequence Number: pepedex completed successfully
52 lines written to /u/designer/jsmith/jobsub/pepedex_988521.lis

Name	ID	ECLS	Status	Message
Campbell David	710000004	CF	Active	**WARNING** Invalid Employment Status Indicator.
Garrett Linda	710000006	CF	Active	**WARNING** Invalid Employment Status Indicator.
Preston Thomas	710000010	F1	Active	**WARNING** Invalid Employment Status Indicator.

Connected
Connected

Example of Annual Salary Calculation for CA-MIS

Consider the example of employee Sally Jones who has earn codes set up for Premium earnings, Additional earnings, shift differential and longevity with the following NBAJOBS information:

Original Hire Date	1/1/2000
Current Hire Date	1/1/2000
Adjusted Service Date	1/1/2000
Seniority Date	1/1/2000
Employee's pay rate	\$20.00
Employee's hours per pay	160
Employee's pays per year	12
Employee's base annual salary	\$38,400.00

Employee's default earnings

<i>Earn Code</i>	<i>Shift</i>	<i>Hours</i>	<i>Rate (if different from regular rate)</i>
REG	1	80	
REG	2	80	
MIL	1	10	0.50
NRP	1	20	
TTP*	1	10	

*Transition payment

Today's Date is 10/1/2003

Years of Service: 3 years 9 months

Applicable Longevity Rule: 3 years 0 months to 5 years 0 months - 10% longevity

Applicable Shift Differential Rule: Additional \$.25/hour for shift 2

Applicable Premium Pay: Apply 1.00 per hour for REG 1 and REG 2 hours (asbestos removal)

Additional Earnings to be included: Mileage rate (MIL), Non-resident payment (NRP)

Longevity Earnings

The Annual Longevity Amount is calculated as follows:

$$\begin{aligned} \text{Longevity per Hour} &= [(\text{Reg rate} \times \% \text{ longevity}) + \text{flat amount longevity}] \\ \text{Annual Longevity Amount} &= \text{Longevity per hour} \times \text{hours per pay} \times \text{pay factor} \end{aligned}$$

In the above example,

$$\begin{aligned} \text{Longevity per hour} &= [(20.00 \times 10) + 0] \\ \text{Annual Longevity Amount} &= \$2.00 \times 160 \times 12 \\ &= \$3840.00 \end{aligned}$$

Shift Differential Earnings

The annual shift differential amount is calculated as follows:

$$\begin{aligned} \text{Shift Amount per Hour} &= [(\text{Reg rate} \times \% \text{ shift}) + \text{flat amount shift}] \\ \text{Annual Shift Amount} &= \text{Shift amount per hour} \times \text{hours per pay} \times \text{pay factor} \end{aligned}$$

In the above example,

$$\begin{aligned}\text{Shift amount per hour} &= [(20.00 \times 0) + 0.25] \\ \text{Annual Shift Amount} &= \$0.25 \times 80 \times 12 \\ &= \$240.00\end{aligned}$$

Premium Pay Earnings

The annual earnings from premium pay is calculated as follows:

$$\begin{aligned}\text{Premium Amount per Hour} &= [(\text{Reg rate} \times \% \text{ premium}) + \text{flat amount prem.}] \\ \text{Annual Premium Amount} &= \text{Shift premium per hour} \times \text{hours per pay} \times \text{pay factor}\end{aligned}$$

In the above example, applicable premium earnings are REG1 and REG2 which are calculated as follows:

REG1

$$\begin{aligned}\text{Premium Amount per Hour} &= [(20.00 \times 0) + 1] \\ \text{Annual Premium Amount} &= \$1.00 \times 80 \times 12 \\ &= \$960.00\end{aligned}$$

REG2

$$\begin{aligned}\text{Premium Amount per Hour} &= [(20.00 \times 0) + 1] \\ \text{Annual Premium Amount} &= \$1.00 \times 80 \times 12 \\ &= \$960.00\end{aligned}$$

$$\text{Total Annual Premium Earnings} = (\$960 + \$960) = \$1920.00$$

Annual Additional Earnings

The annual additional earnings for calculated as follows:

Annual additional earning amount = Default Rate x Hours per Pay x Pay Factor

In the above example, applicable earnings are MIL and NRP

MIL = .50 x 10 = 5 x 12 = \$60

NRP = 20 x 20 = 400 x 12 = \$4800

Therefore, Total annual additional earnings = \$4860

Annual Salary

The final annual salary determined from the above information and reported on PEPEDEX is calculated as:

Base annual salary	=	\$ 38,400.00
Longevity	+ =	\$ 3840.00
Shift Differential	+ =	\$ 240.00
Premium Earnings	+ =	\$ 1920.00
Additional Earnings	+ =	\$ 4860.00
Total Annual Salary	=	\$49260.00