STEPHEN F. AUSTIN
STATE UNIVERSITY

Human Resources

"ELECTRONIC PERSONNEL ACTION FORM" (EPAF) HANDBOOK

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Confidential Business Information

This learning guide is based upon SunGard Higher Education Banner documentation. This document is for use at Stephen F. Austin State University for the purpose of training; the information contained herein is considered confidential.

Date Definitions and Instructions

Important Date Definitions and Instructions

The definitions and instructions will include the most frequently used words and phrases for Origination and Approval of EPAFs. This section will cover the EPAF Query Date and other important dates.

Date(s) Definition and Instruction

Current Hire Date

The current hire date defaults to the Query Date and should be the employment begin date.

Job Begin Date

- First date the employee has ever held the position-suffix number in the system. Usually the same as the Jobs Effective Date. May be different with Reappointments.

Jobs Effective Date

- Same as the query date. This date will start, stop, and update the employee pay and will correspond to an active or terminated job status.

Job End Date

- The date the job assignment ends. Same as the jobs effective date of a termination.

Labor Distribution Effective Date

- The labor distribution effective date will default from the query date.

Last Paid Date

- The date the employee was last paid through. If the last paid date is after the effective dates, add a comment for the EPAF Applier. An adjustment will need to be made by the EPAF Applier to get the EPAF to apply.

Last Day Worked

- Actual last physical day worked.
- If this date is different from the termination date you will need to put an explanation in the comment section of the EPAF. An example would be if an employee's Last physical Day Worked was October 20th and the Termination Date and Query Date are October 31st. This type of comment must be included in the comments section of the EPAF in order that Payroll would pay them correctly.

Personnel Date

- The Personnel Date is the actual date of record that the employee began the job assignment. This date can be different from the query date. (See the Department Date Memorandum submitted via ListServ prior to each new semester which will give you the correct dates to use for faculty, graduate assistants and work study).

Query Date

- When the originator is creating the new EPAF, the Query Date will default to today's date. However, the chances of this happening are very rare. Ninety nine percent of the time, the originator will need to change the Query Date to reflect the date of the action being taken.
- The Query Date must always be the same as the Effective Date of the action being taken. Examples would be a hire, any type of change, etc. If the Query Date and Effective Date are not the same, the EPAF will error out and will not apply to the HR system. The EPAF will be returned and the originator will be asked to void the EPAF and create a new one using the correct dates.
- Query Date and labor distribution effective date should always be the same or the EPAF will be returned for correction. If the dates are not the same the EPAF will not apply to the HR system.
- The Query Date must always be 'after' or 'the same as' the Last Paid Date.

Term Jobs Effective Date

- Date job assignment actually ends. (See the Department Date Memorandum submitted via ListServ prior to each new semester which will give you the correct dates to use for faculty, graduate assistants and work study).

Term Personnel Date

- The Term Personnel Date is the actual date the employee leaves the assignment. This date can be different from the Jobs Effective Date. (See the Department Date Memorandum submitted via ListServ prior to each new semester which will give you the correct dates to use for faculty, graduate assistants and work study).

Update Default Earnings Effective Date

- The date will be the same as the Query Date and the Jobs Effective Date.

Additional Definitions and Instructions

Additional Definitions and Instructions

The definitions and instructions will include the most frequently used words and phrases for Origination and Approval of EPAFs. This section will cover the additional important EPAF related words and phrases.

Additional EPAF Definitions and Instructions

Approval Category

- The Approval Category is the type of EPAF to use for the action that is about to take place. Correct selection of the Approval Category is critical to the creation of an EPAF. Should an incorrect Approval Category be selected it will be returned to the Originator to be voided and the correct EPAF Approval Category will be chosen, completed and submitted. Any questions regarding Approval Category EPAFs should be directed to Human Resources by using the contact list provided.

Factor

- The number of pay periods between the beginning and ending of the assignment are based on the payroll calendar. If the employee works the spring semester (January through May) the factor will be '5' months. If the employee works the fall semester (September through December) the factor will be '4' months.
- Employees that are hourly and paid semi-monthly will have pays of twenty four (24) since they are paid twice monthly.

FTE

- Describes the Full-time Equivalent (FTE) and the percentage of a full-time appointment. An example would be a 100% appointment represents an FTE of 1.0, or a 50% appointment represents an FTE of .50. DO NOT use percent signs when completing EPAFs. Always use numbers with decimals.

Generate New ID

- New IDs are only generated when the person does not exist in the system. See "Person Search". Generate New ID will be completed as follows:
- Click on New EPAF
- This will take you back to the 'New EPAF Person Selection' screen.
- Click on the 'Generate New ID' icon (the small yellow person icon).
- The word GENERATED now appears in the 'ID' field. The word GENERATED will remain on the EPAF as you create it until it is 'saved' and 'submitted. Once submitted the Transaction Number on the EPAF will have the ID number.
- Enter the Query Date (begin date of the action being taken).
- Enter the EPAF Approval Category.
- Click on 'Go' and begin creating the New Person EPAF.

Hours per Day – The total number of hours per day the employee will work on the job. Examples of the most commonly used Hours per Day are:

- 1.0 FTE = 8 hours per day
- 0.75 FTE = 6 hours per day
- 0.50 FTE = 4 hours per day
- 0.25 FTE = 2 hours per day

A complete listing of all FTE hours per day configurations will be found on the FTE Calculations spreadsheet included in this handbook. All questions should be directed to a Human Resources EPAF representative.

Hours per Pay – The total number of hours per pay for each job worked. Examples of the most commonly used Hours per Pay used for monthly and semi-monthly are:

Monthly paid positions:

- 1.0 FTE = 173.33 monthly hours per pay
- 0.75 FTE = 129.99 monthly hours per pay
- 0.50 FTE = 86.66 monthly hours per pay
- 0.25 FTE = 43.33 monthly hours per pay

Semi-monthly paid positions:

- 1.0 FTE = 86.66 semi-monthly hours per pay
- 0.75 FTE = 64.99 semi-monthly hours per pay
- 0.50 FTE = 43.33 semi-monthly hours per pay
- 0.25 FTE = 21.66 semi-monthly hours per pay

A complete listing of all FTE hours per pay configurations will be found on the FTE Calculations spreadsheet included in this handbook. All questions should be directed to a Human Resources EPAF representative.

Pays

- The number of pay checks or payments the employee will receive. The monthly paid employee that works the spring semester and will have a factor of five (5) months will receive five (5) monthly payments. The same will be correct if working the fall semester, with the monthly paid employee receiving four (4) payments.
- Employees that are hourly and paid semi-monthly will have payments of twenty four (24) since they are paid twice monthly.

Percent (Labor Distribution)

- The percent of the salary that is associated with the labor distribution on the EPAF. The total of all labor distribution records must equal 100%. Split funding is often used and the EPAF will accept a number of separate fund percentages as long as the total is 100%.

Person Search (Avoid Duplicate Social Security Number)

- Prior to completing a 'Person Search' of what 'might' be a new employee, ask the following questions:
    - Ask the prospective employee if they have ever been a student or worked as a student at SFA.
    - Have they ever completed work and been paid as a 'vendor'?
    - Retiree of the University might be returning to work part-time.
    - Was the prospective employee paid travel reimbursement?

These questions are important since they might determine that this prospective employee will have an 'existing ID number' and creating a second ID number would create a multitude of serious problems for the IT Department.

- To use the new EPAF Person Selection screen begin by clicking on the search icon that looks like a looking glass.
    - Searching can be completed in three ways:
        - Last Name and First Name
        - CID Number if employee has been 'connected' with SFA in the past. If the employee has been connected with SFA and does not remember their ID Number, contact HR and speak with one of the EPAF representatives and they will locate that number for you.
        - Social Security Number, which is the best search choice possible. If the SSN is not available and employee does not remember their number call HR and speak with the EPAF representatives and they will assist you.

When the search is complete and 'there are no records available based on the criteria' are found contact HR for assistance. If HR is unable to locate the employee in the HR System one of our representatives will assist you in 'Generating' a new ID for the employee. (Instructions can be found on Additional Definitions and Instructions).

Premium Pay Code

- Two (2) types of Premium Pay Codes are used in connection with the EPAF:
    - LONG – (Longevity) Staff only and must be 100% FTE, in an eligible position and must follow State of Texas regulations.
    - HAZD – (Hazardous Duty) Commissioned Police Officers Only, at 100% FTE, in an eligible position and must follow State of Texas regulations.

Proxy

- The individual authorized to take action on an EPAF in place of the defined Approver. Each Approver should have a minimum of two (2) proxies selected. The Proxy is used as backup to aid in keeping the flow moving through the approval queues. An assigned Proxy must have completed EPAF training.

Routing Queue

- The path an EPAF travels from Originator to completion which allows each Approver the opportunity to review and approve or return for correction any EPAF. Each approval category has required approval levels. Some of the levels are preset and will automatically default the approval level; however you will need to select the appropriate person. The option is available to insert additional levels as needed i.e. Dean, etc. Routing is required for each EPAF.

Transfer Position (Within or outside current department)

- The Transfer EPAFs are the most difficult EPAFs to complete. It is the recommendation of Human Resources that prior to creating this EPAF you contact one of the HR representatives to assist you by walking you through this EPAF. It will avoid much frustration if you just make that call.

Approver Responsibility

EPAF Approver Responsibility

EPAFs submitted by the department Originator must be reviewed, approved or returned for correction by the Approver specified in the routing queue. Approvers are notified via email that an EPAF needs to be approved. It is the responsibility of the Approver to review the EPAF for correctness (annual salary, Title, FTE, etc.) and either Approve or, if Returning for Correction, add comments reflecting what changes the Originator is to make.

Steps to Approve

To view pending EPAF transactions for Approval:

- Log on to Self Service Banner.
- Click on Employee tab.
- Click on Electronic Personnel Action Forms.
- Click on EPAF Approver Summary.

You will have three (3) 'tabs' in your queue:

- 'Current' – EPAFs requiring Approval action
- 'In My Queue' – EPAFs listing you as an approver, but have not yet reached your approval level.
- 'History' – All EPAFs that have received action, and are applied in the system.

To take action and Approve EPAFs:

- Click on the 'Approver Summary' tab.
- Click on the 'Current Tab'. Begin at the top of the list and click on the first employee's name.
- Review all details of EPAF, i.e. dates, salary, FTE, Org
- When review is complete you have the following choices:
    - Approve
    - Disapprove – (permanently disapproves EPAF. Originator must create a new EPAF after a disapproval).
    - Return for Correction – (sends EPAF back to Originator for correction)
    - Comments – (Include the instructions the Originator needs to make necessary changes)

- Choose the appropriate action and click
- The EPAF is now approved and in route to the next Approver on the Queue.

FTE Calculations

Semi-Monthly Employees		
FTE	Hours Per Day	Hours Per Pay
0.13	1.04	11.27
0.14	1.12	12.13
0.15	1.2	13
0.16	1.28	13.87
0.17	1.36	14.73
0.18	1.44	15.6
0.19	1.52	16.47
0.2	1.6	17.33
0.21	1.68	18.2
0.22	1.76	19.07
0.23	1.84	19.93
0.24	1.92	20.8
0.25	2	21.66
0.26	2.08	22.53
0.27	2.16	23.4
0.28	2.24	24.26
0.29	2.32	25.13
0.3	2.4	26
0.31	2.48	26.86
0.32	2.56	27.73
0.33	2.64	28.6
0.34	2.72	29.46
0.35	2.8	30.33
0.36	2.88	31.2
0.37	2.96	32.06
0.38	3.04	32.93
0.39	3.12	33.8
0.4	3.2	34.66
0.41	3.28	35.53
0.42	3.36	36.4
0.43	3.44	37.26
0.44	3.52	38.13
0.45	3.6	39
0.46	3.68	39.86
0.47	3.76	40.73
0.48	3.84	41.6
0.49	3.92	42.46
0.5	4	43.33
0.51	4.08	44.2
0.52	4.16	45.06
0.53	4.24	45.93
0.54	4.32	46.8
0.55	4.4	47.66
0.56	4.48	48.53

Semi-Monthly Employees Cont.		
FTE	Hours Per Day	Hours Per Pay
0.57	4.56	49.4
0.58	4.64	50.26
0.59	4.72	51.13
0.6	4.8	52
0.61	4.88	52.86
0.62	4.96	53.73
0.63	5.04	54.6
0.64	5.12	55.46
0.65	5.2	56.33
0.66	5.28	57.2
0.67	5.36	58.06
0.68	5.44	58.93
0.69	5.52	59.8
0.7	5.6	60.66
0.71	5.68	61.53
0.72	5.76	62.4
0.73	5.84	63.26
0.74	5.92	64.13
0.75	6	64.99
0.76	6.08	65.86
0.77	6.16	66.73
0.78	6.24	67.59
0.79	6.32	68.46
0.8	6.4	69.33
0.81	6.48	70.19
0.82	6.56	71.06
0.83	6.64	71.93
0.84	6.72	72.79
0.85	6.8	73.66
0.86	6.88	74.53
0.87	6.96	75.39
0.88	7.04	76.26
0.89	7.12	77.13
0.9	7.2	77.99
0.91	7.28	78.86
0.92	7.36	79.73
0.93	7.44	80.59
0.94	7.52	81.46
0.95	7.6	82.33
0.96	7.68	83.19
0.97	7.76	84.06
0.98	7.84	84.93
0.99	7.92	85.79
1	8	86.66

Monthly Employees		
FTE	Hours Per Day	Hours Per Pay
0.13	1.04	22.53
0.14	1.12	24.27
0.15	1.2	26
0.16	1.28	27.73
0.17	1.36	29.47
0.18	1.44	31.2
0.19	1.52	32.93
0.2	1.6	34.67
0.21	1.68	36.4
0.22	1.76	38.13
0.23	1.84	39.87
0.24	1.92	41.6
0.25	2	43.33
0.26	2.08	45.07
0.27	2.16	46.8
0.28	2.24	48.53
0.29	2.32	50.27
0.3	2.4	52
0.31	2.48	53.73
0.32	2.56	55.47
0.33	2.64	57.2
0.34	2.72	58.93
0.35	2.8	60.67
0.36	2.88	62.4
0.37	2.96	64.13
0.38	3.04	65.87
0.39	3.12	67.6
0.4	3.2	69.33
0.41	3.28	71.07
0.42	3.36	72.8
0.43	3.44	74.53
0.44	3.52	76.27
0.45	3.6	78
0.46	3.68	79.73
0.47	3.76	81.47
0.48	3.84	83.2
0.49	3.92	84.93
0.5	4	86.66
0.51	4.08	88.4
0.52	4.16	90.13
0.53	4.24	91.86
0.54	4.32	93.6
0.55	4.4	95.33
0.56	4.48	97.06

Monthly Employees Cont.		
FTE	Hours Per Day	Hours Per Pay
0.57	4.56	98.8
0.58	4.64	100.53
0.59	4.72	102.26
0.60	4.8	104
0.61	4.88	105.73
0.62	4.96	107.46
0.63	5.04	109.2
0.64	5.12	110.93
0.65	5.2	112.66
0.66	5.28	114.4
0.67	5.36	116.13
0.68	5.44	117.86
0.69	5.52	119.6
0.70	5.6	121.33
0.71	5.68	123.06
0.72	5.76	124.8
0.73	5.84	126.53
0.74	5.92	128.26
0.75	6	129.99
0.76	6.08	131.73
0.77	6.16	133.46
0.78	6.24	135.2
0.79	6.32	136.93
0.80	6.4	138.66
0.81	6.48	140.4
0.82	6.56	142.13
0.83	6.64	143.86
0.84	6.72	145.6
0.85	6.8	147.61
0.86	6.88	149.06
0.87	6.96	150.8
0.88	7.04	152.53
0.89	7.12	154.26
0.90	7.2	156
0.91	7.28	157.73
0.92	7.36	159.46
0.93	7.44	161.2
0.94	7.52	162.93
0.95	7.6	164.66
0.96	7.68	166.4
0.97	7.76	168.13
0.98	7.84	169.86
0.99	7.92	171.6
1	8	173.33

Origination Request Form Explanation

EPAF Origination Request Form Purpose

EPAF Origination Request Forms are submitted by department Originators requesting Human Resources originate an Electronic Personnel Action Form (EPAF) and submit on their behalf. This form is designed specifically for salary supplements, teaching overloads and faculty summer teaching/research.

Create Form

Access the Origination Request form by going to the Human Resources website, Employment: EPAF-Resources, Forms, EPAF-Related Forms then EPAF Origination Request form.

Explanation and samples are given on the form of what types of payments the form will cover. The form also explains how the summer sessions are split.

Section I

- Include Employee Name, Employee CID Number (not the Social Security Number), department requesting the assignment, department org number.

Section II

- Using the drop down on the far right select one of the Salary Supplement Types, i.e. Faculty Course Overload (OVR), Maymester (MAY), Summer Session 1 (SS1), etc.
- Begin Date and End Dates: (Follow instructions outlined in the Summer Semester Assignment Processing and Payment memo along with the Employment Dates for Spring and Fall Semesters sent out on the HR ListServ). Remember that Salary Supplements cannot cross fiscal years.
- Include the Faculty Overload FTE. Provide a brief explanation for the purpose of the salary supplement/assignment.

Section III

- Amount (check Monthly Rate or Semester Salary)
- Funding FOP (Fund, Org, Program) Salary Supplements cannot be paid from research or sponsored program funds.

Section IV

- To be completed by Human Resources

Submit the completed form to Human Resources at HR-Epaf@sfasu.edu. Questions concerning this form should be directed to Human Resources EPAF contact person.

Stephen F. Austin State University

EPAF Origination Request Form

This form is submitted by departments requesting Human Resources originate an Electronic Personnel Action Form (EPAF) and submit on their behalf. This form is to be used specifically for salary supplements (including teaching overloads) and faculty summer teaching/research.

For more information related to salary supplements, see policy E-9 (Salary Supplements, Stipends, and Additional Compensation). Requests for additional compensation are submitted using the *Authorization for Additional Compensation Services Form* and requests for stipends are submitted using the *Stipend Authorization Form;* both found on the Human Resources website.

"Salary supplement" means a payment that temporarily augments the base appointment salary. Examples of salary supplements may include compensation for: (1) interim appointments; (2) faculty course overloads; (3) endowed positions; and (4) mentoring students as part of a certification program.

Summer teaching assignments are split between maymester (MAY), summer session I (SS1), summer session II (SS2), summer faculty research (SFR), and summer faculty administration (SAF). A separate EPAF should be submitted for each summer assignment.

Once this form is completed, please email the request to Human Resources at HR-Epaf@sfasu.edu.

SECTION I – Employee Information

Employee Name: CID Number:

Requesting Department: Department Org #:

SECTION II – Type of Request & Details

Please complete the applicable portions of this section.

Salary Supplement Type:

Begin Date: End Date: / Semester:

*Salary Supplement requests cannot cross fiscal years.

Faculty Overload FTE *(if applicable)*:

Please provide a brief explanation for the purpose of the salary supplement/assignment:

SECTION III – Payment of Funds

Amount: $ ☐ Monthly Rate ☐ Semester Salary

FUNDING: (FOP) Fund: Org: Program:

** Salary supplements cannot be paid from research or sponsored program funds.

SECTION IV – To Be Completed by Human Resources

Posn: _____ Suffix: _____ Title: _____

EPAF Approval Category: _____ EPAF Transaction #: _____

EPAF originated and submitted by: _____ Date: _____

Request Submitted by: _____ Date Received: _____

Change Request Form-Summer Explanation

EPAF Change Form Purpose

EPAF Change Request Forms are submitted by department Originators requesting Human Resources originate an Electronic Personnel Action Form (EPAF) and submit on their behalf. This form is designed specifically for changes or to terminate an 'existing faculty and summer assignment'. Human Resources will originate and Electronic Personnel Action Form (EPAF) and submit on their behalf. Note that Funding Changes are only made on the 'Change-Funding Source (CHNG50)' EPAF and the Change Request Form does not create additional assignments.

Create Form

Access the EPAF Change Request Form by going to the Human Resources website, Employment: EPAF Resources, Forms: EPAF-Related Forms, EPAF Change Request form.

Section I

- Include Employee Name, Employee CID Number (not the Social Security Number), department requesting the assignment, department org number.

Section II

- Click on the box that applies to the change to be made (Change to Assignment or Terminate Assignment).
- Change to Assignment -be sure to include the FTE i.e. 50% FTE, the Amount of the Salary change and the Timesheet Org.
- Terminate Assignment – click on the response box that asks if work has been performed in this assignment. If yes, provide the last day the employee worked.
- Provide an explanation for the change i.e., Class 501.1 was dropped which changed FTE to reflect 25% in lieu of 50% which affected the salary amount change.

Section III

- To be completed by Human Resources

Submit the completed form to Human Resources at HR-Epaf@sfasu.edu. Questions concerning this form should be directed to Human Resources EPAF contact person.

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EPAF Origination Request Form - Summer

This form is submitted by departments notifying Human Resources of a change in an existing faculty summer assignment. Human Resources will then originate an Electronic Personnel Action Form (EPAF) and submit on their behalf.

Note: changes to funding can be completed by the department via the 'Change – Funding Source (CHNG50)'EPAF. Requests for an additional assignment that does not currently exist can be submitted via the EPAF Origination Request form.

Once this form is completed, please email the request to Human Resources at HR-Epaf@sfasu.edu.

SECTION I – Employee Information

Employee Name: CID Number:

Requesting Department: Department Org #:

SECTION II – Change Details

Select and complete all that apply to this change request.

☐ CHANGE TO ASSIGNMENT

FTE: Amount: $ Timesheet Org:

☐ TERMINATE ASSIGNMENT

Has the employee performed any work in this assignment? ☐ Yes ☐ No

If yes, provide the last day the employee worked in the job:

Please provide a brief explanation for the change:

SECTION III – To Be Completed by Human Resources

Posn: _____ Suffix: _____ Title: _____

EPAF Approval Category: _____ EPAF Transaction #: _____

EPAF originated and submitted by: _____ Date: _____

Request Submitted by: _____ Date Received: _____

Additional Comments/Notes: _____

_____

_____

EPAF ListServ

EPAF ListServ Instructions

Regular updates, reminders, and tips will be sent to those on campus who choose to subscribe to the EPAF ListServ. HR strongly encourages you to subscribe in order that you will be current on what to include on the EPAFs you are originating or approving.

Steps to subscribe

Subscribing & Unsubscribing to the ListServ Instructions for a User to Subscribe/Unsubscribe:

Subscribe:

Send a message to mailserv@titan.sfasu.edu with a blank subject and in the body type the following to subscribe:

subscribe EPAF-L

Unsubscribe:

To unsubscribe just change the word 'subscribe' to 'unsubscribe'.

Subscriber may need to convert the email to Plain Text to ensure no other text is sent with the request.

EPAF Approver – Assigning an EPAF Proxy

Assignment an EPAF Proxy

A Proxy is the individual authorized to take action on an EPAF in place of the defined Approver. Each Approver should have a minimum of two (2) Proxies to act on their behalf when needed. The Proxy is used as a backup to aid in keeping the flow of the EPAF moving through the individual Routing Queues. The Proxy will access the queue using their individual system password and User ID. To act as a Proxy, an individual must have completed EPAF training.

Steps to Assign a Proxy

Instructions for assigning an EPAF Proxy in Banner SSB:

- Login to Banner Self-Service via MySFA.
- Click on the Employee tab.
- Click on Electronic Personnel Action Forms.
- Click on EPAF Proxy Records.
- Select the approval level (Department Head/Chair, DEPTHD).
- Click on 'Go'.
- Using the drop-down box select the person's name you are setting up as proxy.
- Click the 'Add' box.
- The Proxy's name will appear above the drop down box.
- Save.

Instructions to remove a Proxy from your Proxy list:

- Follow steps 1 – 4 shown above.
- Find the individual to remove
- Click the Remove box next to the name
- Save.

Update the Proxy record when employees leave your department by removing them from the Proxy list. If you do not complete this process the individual will still have access to your approval level.

Add a new individual to replace the one you just removed from the Proxy list.

(Do not set up Student employees as a Proxy.)

EPAF Approver – Acting as an EPAF Proxy

Acting as an EPAF Proxy

A Proxy is the individual authorized to take action on an EPAF in place of the defined Approver. Each Approver should have a minimum of two (2) Proxies to act on their behalf when needed. The Proxy is used as a backup to aid in keeping the flow of the EPAF moving through the individual Routing Queues. The Proxy will access the queue using their individual system password and User ID. To act as a Proxy, an individual must have completed EPAF training.

Steps to Act as a Proxy

Instructions for acting as an EPAF Proxy in Banner SSB:

- Login to Banner Self-Service via MySFA.
- Click on the Employee tab.
- Click on Electronic Personnel Action Forms.
- Click on Act as Proxy.
- Click on the drop down arrow next to 'Proxy For'
- Find the Approver you will Proxy for and click on the name
- Do not use the 'Submitted From and To Dates'.
- Click on Go.

The next screen will show all EPAFs in the Approver Queue for you to review. Click on the name of the individual and this will take you directly to the EPAF. Carefully review the EPAF and follow the instructions given on Approval Responsibility in this handbook.

Pooled Position Numbers

Pooled position numbers are utilized for graduate assistants, casual employee and adjunct and visiting faculty. These position numbers are assigned specifically to each department. If you need a list of your department's pooled positions, please contact Human Resources.

Human Resources EPAF Contacts

Contact Level:	*Primary*	*Secondary*
EPAFS	Kimberly Odems	Linda Parish

Preferred contact method: email @ hr-epaf@sfasu.edu

****Review each Epaf on our website if needed, for detailed instructions prior to contacting HR Support**

STEPHEN F. AUSTIN STATE UNIVERSITY

Human Resources
P.O. Box 13039, SFA Station • Nacogdoches, Texas 75962-3039
Phone (936) 468-2304 • Fax (936) 468-1104
Website: www.sfasu.edu/hr
For email use only
Website: www.stasu.edu/hr
For email use only

TO: EPAF ListServ

DATE: August 8, 2016

SUBJECT: Upcoming Changes for Graduate Assistant Appointments

The time leading up to each new semester can be hectic with everything that must be taken care of prior to the first day of class. With this in mind, we set out to identify ways to improve EPAF processing in an attempt to help reduce the amount of time we all spend originating, reviewing, approving, and applying EPAFs during these busy periods.

Beginning with the 2016-2017 academic year, graduate teaching assistants, graduate research assistants, and graduate administrative assistants can be **appointed on an academic year basis** using the same EPAFs that you have used in the past to hire new graduate assistants (HIRE50) or reappoint returning graduate assistants (REAP50). Nine month appointments mean:

- Less time spent creating, reviewing, and approving EPAFs
- Graduate assistants will receive their academic year salary in nine even disbursements from September (October 1st paycheck) through May (June 1st paycheck)

As many of you may already know, there have also been changes to the Fair Labor Standards Act (FLSA) that will result in some of the university's positions currently classified as exempt from overtime transitioning to non-exempt. **Graduate administrative assistants** are among those who will be transitioning. Beginning with the 2016-2017 academic year, graduate administrative assistantships will be non-exempt positions. They will remain salaried and part-time benefits eligible like graduate teaching assistantships and graduate research assistantships; however, there will be a few changes:

- Graduate administrative assistants will be required to track their time in TimeClockPlus
- Graduate administrative assistants who work over forty hours in a week will accrue compensatory time at 1.5 times their hourly rate of pay

Graduate administrative assistant position numbers will also be changing. Beginning with the 2016-2017 academic year, SG9999 and SG9993 will be discontinued and replaced with **two new position numbers: SG9991 and SG9990**.

Please contact Kimberly Odems if you have any additional questions concerning graduate assistant appointments.

TO: EPAF ListServ

FROM: Loretta C. Doty, Director of Human Resources

DATE: June 17, 2019

SUBJECT: **Fall 2019** EPAF Dates for Faculty, Graduate Assistants, and Work-Study Student Assistants

EPAFs are now being accepted for the fall semester of the 2019-2020 academic year. Please refer to the dates provided below when completing EPAFs for faculty, graduate assistants, and work-study student assistants. *The dates provided below are not applicable to staff and student assistant EPAFs because actual employment dates are used for these assignments.*

9-month Faculty (HIRE10)

New Job Assignment

Query Date:	***09/01/2019***
Job Effective Date:	09/01/2019
Personnel Date:	08/22/2019
Job Begin Date:	09/01/2019
Factor/Pays:	9[i]

(08/20/19 if employee is attending new faculty orientation)

Visiting Faculty (9-month) (REAP11 / HIRE11)

New Job Assignment

Query Date:	***09/01/2019***
Job Effective Date:	09/01/2019
Personnel Date:	08/22/2019
Job Begin Date:	09/01/2019
Factor/Pays:	9*

Terminate Job Assignment

Term Job Eff Date:	05/31/2020
Term Personnel Date:	05/13/2020
Job End Date:	05/31/2020

Adjunct Faculty (appointed on a semester basis) (REAP11 / HIRE11)

New Job Assignment

Query Date:	***09/01/2019***
Job Effective Date:	09/01/2019
Personnel Date:	08/22/2019
Job Begin Date:	09/01/2019
Factor/Pays:	4*

Terminate Job Assignment

Term Job Eff Date:	12/31/2019
Term Personnel Date:	12/18/2019
Job End Date:	12/31/2019

Graduate Assistant (REAP50 / HIRE50)

9-month Graduate Assistant

New Job Assignment

Query Date:	***09/01/2019****
Job Effective Date:	09/01/2019**
Personnel Date:	08/26/2019**
Job Begin Date:	09/01/2019**
Factor/Pays:	9*

Terminate Job Assignment

Term Job Eff Date:	05/31/2020**
Term Personnel Date:	05/08/2020**
Job End Date:	05/31/2020**

4-month Graduate Assistant (if graduating in December)

New Job Assignment

Query Date:	***09/01/2019****
Job Effective Date:	09/01/2019**
Personnel Date:	08/26/2019**
Job Begin Date:	09/01/2019**
Factor/Pays:	4*

Terminate Job Assignment

Term Job Eff Date:	12/31/2019**
Term Personnel Date:	12/13/2019**
Job End Date:	12/31/2019**

Work Study Student Assistant (REAP52 / HIRE52)

New/Reappoint Job Assignment

Query Date:	***08/16/2019*****
Job Effective Date:	08/16/2019***
Personnel Date:	08/16/2019***
Job Begin Date:	08/16/2019***

Terminate Job Assignment

Term Job Eff. Date	12/31/2019***
Term Personnel Date:	12/31/2019***
Job End Date:	12/31/2019***

[1] The listed salary for the semester will be paid in equal payments of 4 or 9.

**Personnel dates on Graduate Assistant EPAFs should reflect the actual employment begin and end dates; change if necessary.

***Work Study students can work anytime between August 16 and December 31, 2019 for the Fall 2019 semester.

Fund number will be 279120.

EPAF Processing Times and Apply Cutoffs

EPAF Apply Cutoff

In order to be processed through the applicable payroll run, HR must receive an approved EPAF prior to the Cutoff dates as defined by Payroll. If an EPAF is not received prior to the apply cutoff, the personnel action will not be processed in time for the regular payroll run. Any monies due will have to be processed through a manual/supplemental payroll.

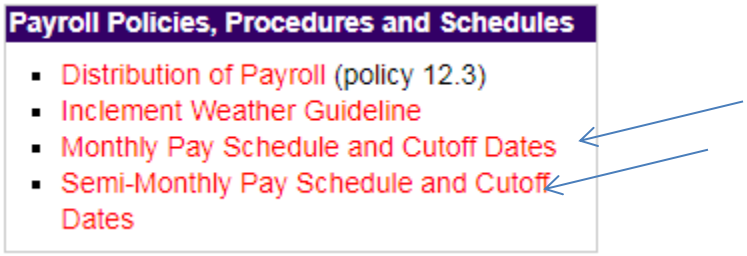
Estimated EPAF Routing Times

Routing times for EPAFs vary by the EPAF Approval Category and the number of approvers in the routing queue. The current estimated routing times are as follows:

- Student Assistant EPAFs – 3 days en route
- Work-study Student Assistant EPAFs – 4 days en route
- Faculty/Staff/Graduate Assistant EPAFs – 2 weeks en route

EPAFs submitted in a timely manner (submitted by the current estimated routing days prior to the EPAF Apply Cutoff date) should expect to be applied into the HR system before payroll runs for that pay period.

Monthly and Semi-Monthly Pay Schedule and Cutoff Dates can be found at http://www.sfasu.edu/controller/payroll/



TERM04: End Employment w/Active Job, Student

Purpose of this EPAF Approval Category

To end the job assignment and the employment for a student position. Closes job record and employment record in the HR system.

Create EPAF

Note: Fields in gray are enterable.

New EPAF Person Selection		
ID	12345678	Enter employee's CID or search for CID. **DO NOT** generate new ID. Contact HR representative.
Query Date	MM/DD/YYYY	Use the date the termination is 'effective.' **Note:** Subsequent dates within this EPAF will default from the query date entered. You will be required to re-create the EPAF if the query date is not correct. **Note:** System defaults current date. Will need to correct. **Note:** The qu Date. Contact
Approval Category	TERM04	**Note:** Once th 'all jobs' butt query date. **Note:** If the employee has another active assignment, please refer to the TERM03 approval category. Once you have the correct approval category and query date, select 'go'
New EPAF Job Selection		
Enter Position Number	SAXXXX	Select the position number of the assignment that you are terminating by selecting the radial button in the 'select' column to the far right. **Note:** This should be the only active assignment for this Student. Once position & suffix are selected, select 'go' to create new EPAF.
Suffix	00	**Note: '**00' is the standard suffix for all assignments unless given express instructions by Human Resources.
TERMINATE JOB ASSIGNMENT		
Jobs Effective Date	MM/DD/YYYY	Defaults from query date.
Personnel Date	MM/DD/YYYY	Defaults from query date.
Job End Date	MM/DD/YYYY	Defaults from query date.
Job Change Reason	Not Selected	Select the reason code that best applies.
Job Status	**T**	Default. Not enterable.
TERMINATE Employee Record		
Termination Date	MM/DD/YYYY	Defaults from query date.
Last Work Date	MM/DD/YYYY	Last physical day student works at SFA
Term Reason Code	Not Selected	Select the reason code that best applies.
Employee Status		Not enterable.

Your comments are important and aid EPAF personnel with further understanding of the personnel action.

ROUTING QUEUE

3	STREVW	HR Student Initial Review	Approve
5	DEPTHD	Department Head/Chair	Approve
95	HRAPRV	Human Resources Approval	Approve
96	PAYROL	Payroll	FYI
97	ITS	ITS Security Access	FYI
99	APPLY	Apply EPAF	Apply

Note: If the assignment is paid from grant funds, add ORSP approval level.
Note: If the Dean requires notification, Add Dean Approval level.
Note: If you add an approval level to the routing queue, choose a required action on the right side

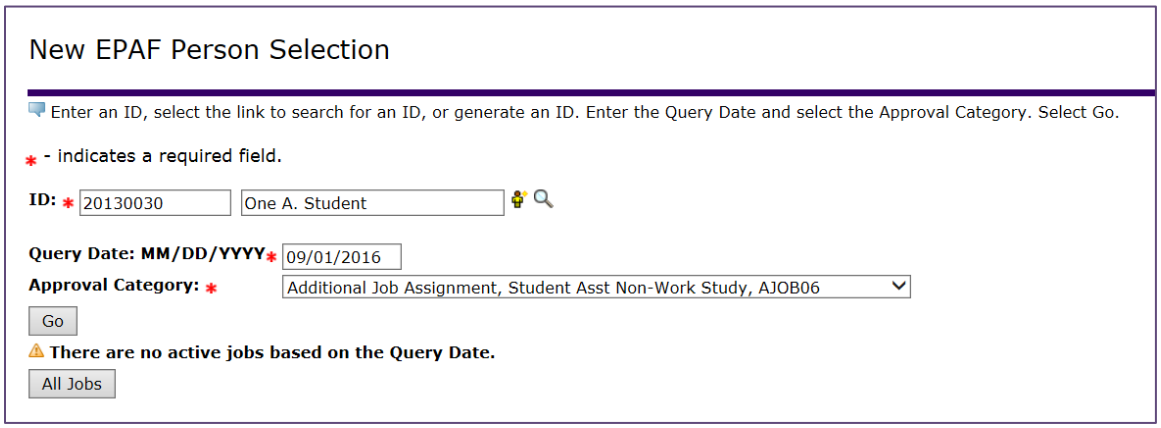
AJOB06: Additional Job Assignment, Student Asst Non-Work Study

Purpose of this EPAF Approval Category

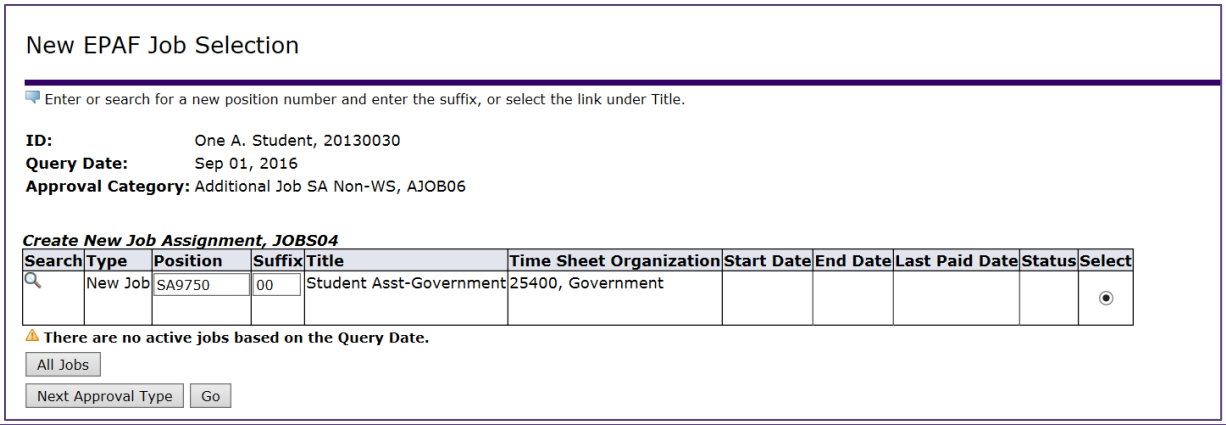
To add an additional job assignment to an existing employee's current job assignment(s). This additional job assignment is a student assistant, non-work study position. Intended for "secondary" assignments. Creates a Job record in the HR system.

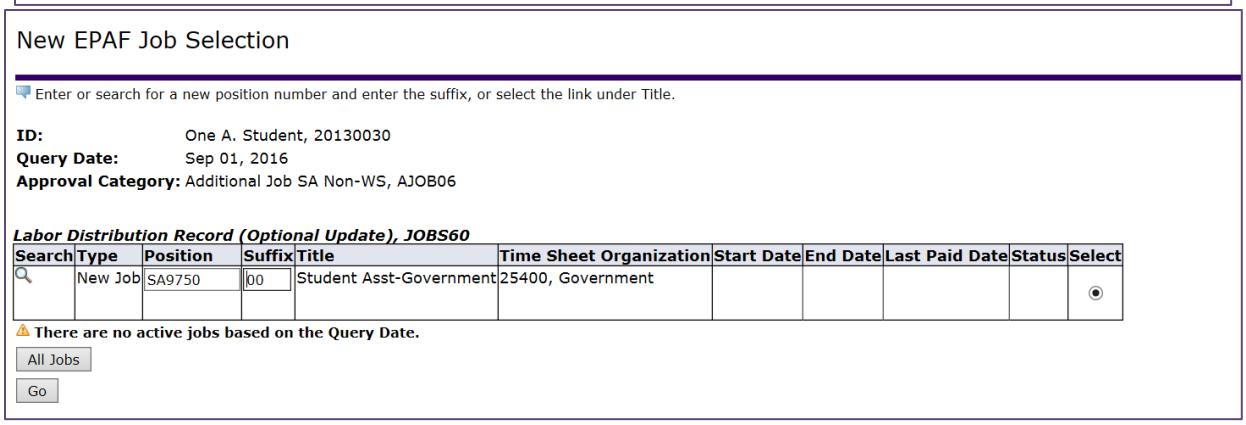
Create EPAF

New EPAF Person Selection		
ID	12345678	Enter employee's CID or Search for CID. **DO NOT** Generate new ID.
Query Date	**MM/DD/YYYY**	Use the date the Job is Effective. **Note:** Subsequent dates within this EPAF will default from the query date entered. You will be required to re-create the EPAF if the Query Date is not correct. **Note:** System defaults current date. Will need to change. **Note:** Query Date must be after Last Paid Date. Contact HR for further information on Dates.
Approval Category	**AJOB06**	**Note:** Once the Approval Category is selected, you can click the 'All Jobs' button to see all of the Employee Job Assignments as of the Query Date. Once you have the correct Approval Category and Query Date, click 'Go'



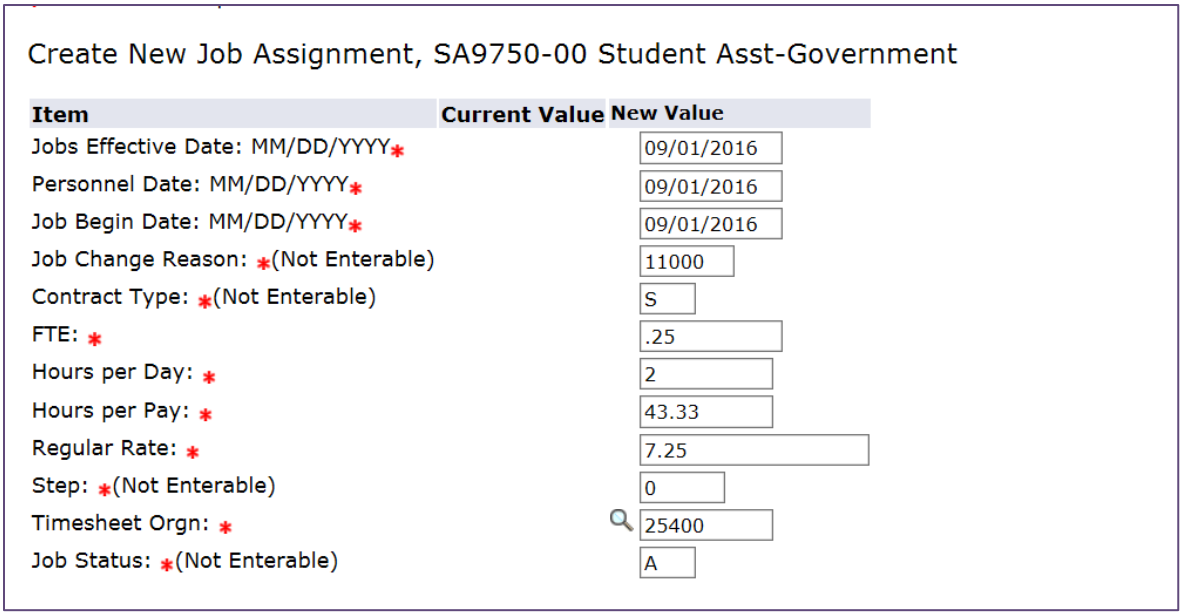
New EPAF Job Selection		
Enter Position Number	SAXXXX	If the person has previously held this position, click the 'All Jobs' button to get a list of previous appointments. Select the appropriate position by clicking the radial button in the 'Select' column to the right. Once position & suffix are entered (or selected), click 'Next Approval Type'. Ensure that the same position number is selected on each record section. When you get to the end, you can click 'Go'
Suffix	**00**	**Note: '**00' is the standard suffix for all assignments unless given express instructions by Human Resources.





CREATE NEW JOB ASSIGNMENT

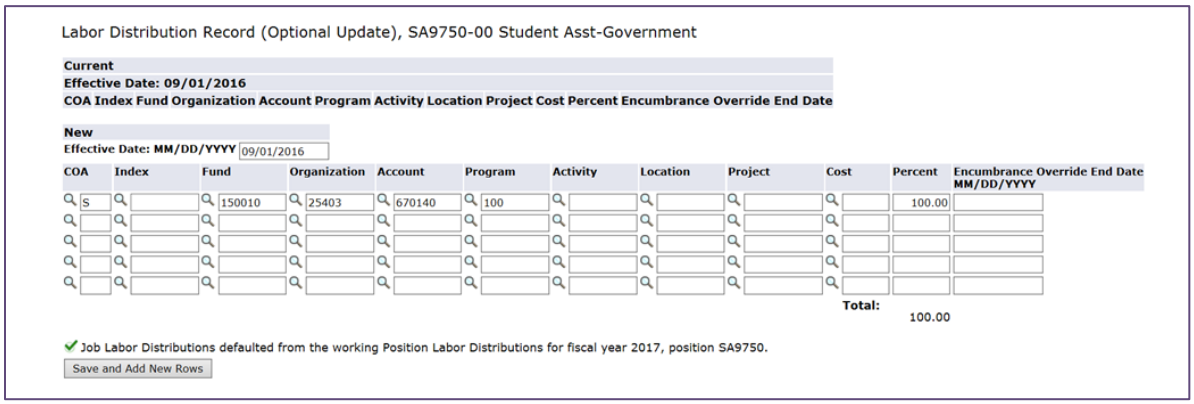
Jobs Effective Date:	MM/DD/YYYY	Defaults from Query Date.
Personnel Date:	MM/DD/YYYY	Defaults from Query Date.
Job Begin Date:	MM/DD/YYYY	Defaults from Query Date.
Job Change Reason:	**11000**	Default. Not Enterable. **Note:** These are only EXAMPLES of possible FTE numbers.
Contract Type:	**Secondary**	Default. Not enterable.
FTE:	0.50	**Note:** Expressed as a decimal, not a percent.
Hours per Day:	4	**Hint:** Hours/day = FTE x 8 hours (i.e. FTE 0.5 x 8 hours = 4)
Hours per Pay:	43.33	**Hint:** Hours/pay = FTE x 86.66 hours (i.e. FTE 0.5 x 86.66 hours = 43.33) – Refer to EPAF FTE Calculations
Regular Rate:	7.25	Hourly pay rate. Do not include dollar signs ($) or commas (,).
Step:	**0**	Default. Not enterable.
Timesheet Org:	12345	5-digit Org number of Department responsible for approving employee's time (via TimeClock or Leave Reporting).
Job Status:	**Active**	Default. Not enterable.



LABOR DISTRIBUTION RECORD

Effective Date: MM/DD/YYYY			**Note:** Defaults from Query Date.			
COA	**Index**	**Fund**	**Organization**	**Account**	**Program**	**Percent**
S	(leave blank)	123456	12345	(Default)	123	100.00
			Include split funding on subsequent lines. Percent should total 100.00			
					Total	100.00

Note: If Index defaults into the Labor Distribution Record, delete the Index before saving.
Note: FOAP defaults from the position/job record. If the defaulted FOAP is incorrect, make changes where necessary



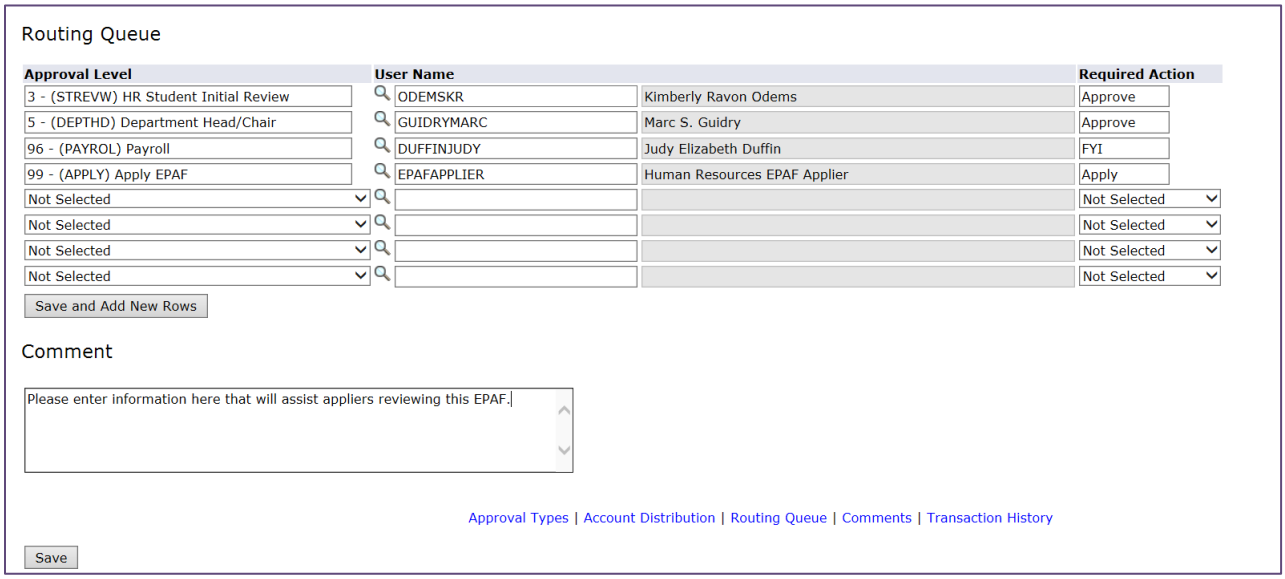
ROUTING QUEUE

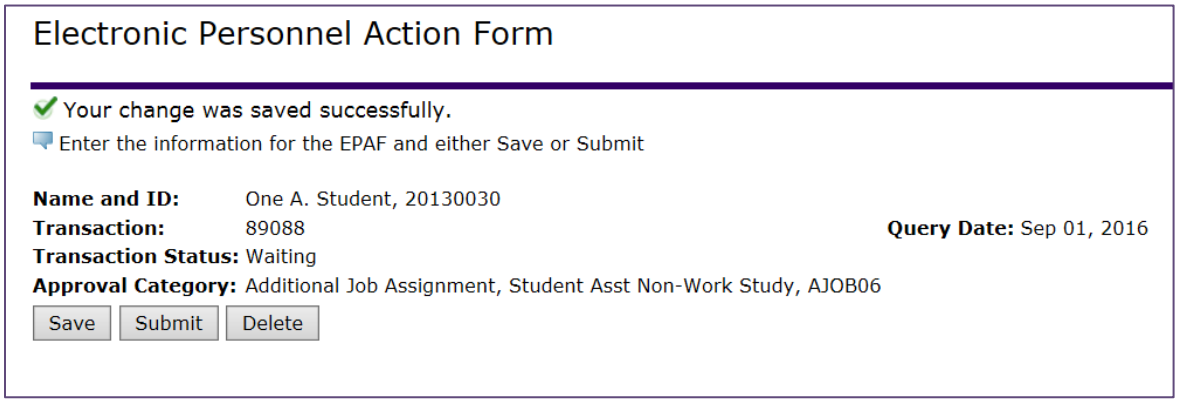
3	STREVW	HR Student Initial Review	Approve
5	DEPTHD	Department Head/Chair	Approve
95	HRAPVR	Human Resources Approval	Approve
96	PAYROL	Payroll	FYI
99	APPLY	Apply EPAF	Apply

Note: If the assignment is paid from grant funds, add ORSP approval.

Note: If the position reports to a dean, add DEAN Approval Level

Note: If you add an Approval Level to the Routing Queue, be sure to choose a Required Action for each added.


Routing Queue
Approval Level
User Name
Required Action
3 - (STREVW) HR Student Initial Review
ODEMSKR
Kimberly Ravon Odems
Approve
5 - (DEPTHD) Department Head/Chair
GUIDRYMARC
Marc S. Guidry
Approve
96 - (PAYROL) Payroll
DUFFINJUDY
Judy Elizabeth Duffin
FYI
99 - (APPLY) Apply EPAF
EPAFAPPLIER
Human Resources EPAF Applier
Apply
Not Selected
Save and Add New Rows
Comment
Please enter information here that will assist appliers reviewing this EPAF.
Approval Types | Account Distribution | Routing Queue | Comments | Transaction History
Save


Electronic Personnel Action Form
Your change was saved successfully.
Enter the information for the EPAF and either Save or Submit
Name and ID: One A. Student, 20130030
Transaction: 89088
Query Date: Sep 01, 2016
Transaction Status: Waiting
Approval Category: Additional Job Assignment, Student Asst Non-Work Study, AJOB06
Save
Submit
Delete

HIRE10: Hire – Faculty

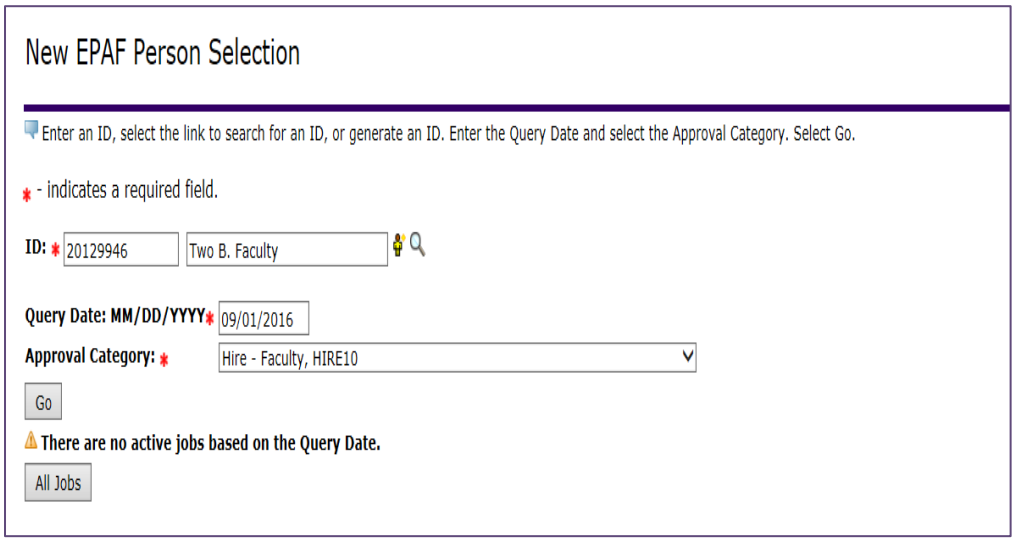
Purpose of this EPAF Approval Category

To hire a new employee into a full-time faculty position. Intended for "primary" assignments. Creates person record, employee record and job record in HR system.

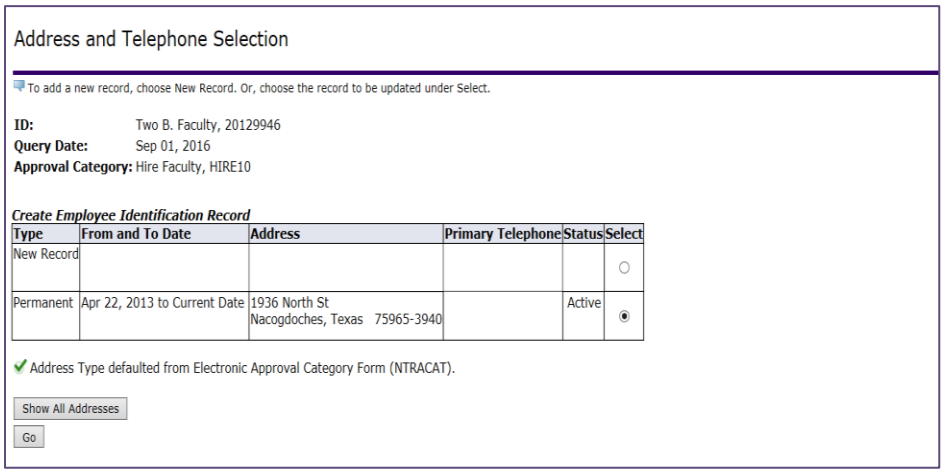
Create EPAF

Note: Fields in gray are Enterable

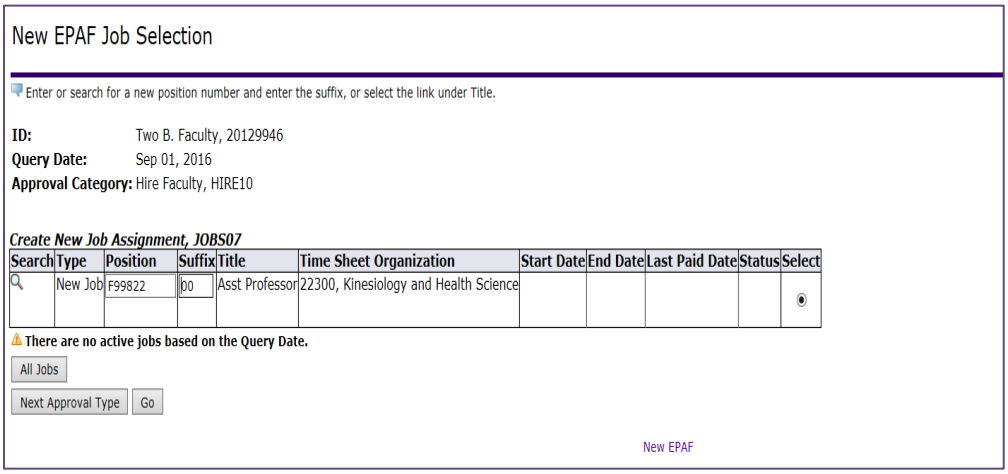
New EPAF Person Selection		
ID	12345678	Enter employee's CID or Search for CID. **DO NOT** Generate new ID. Contact an HR EPAF Representative.
Query Date	MM/DD/YYYY	Refer to the dates memo for correct faculty dates. **Note:** Subsequent dates within this EPAF will default from the query date entered. You will be required to re-create the EPAF if the Query Date is not correct. **Note:** System defaults current date. Will need to correct.
Approval Category	HIRE10	**Hint:** Once the Approval Category is selected, you can select the 'all jobs' button to see all of the employee job assignments as of the query date (if any). Once you have the correct approval category and query date, select 'go' **Note:** If this employee is active in the system with another job, please refer to the **AJOB02** approval category.



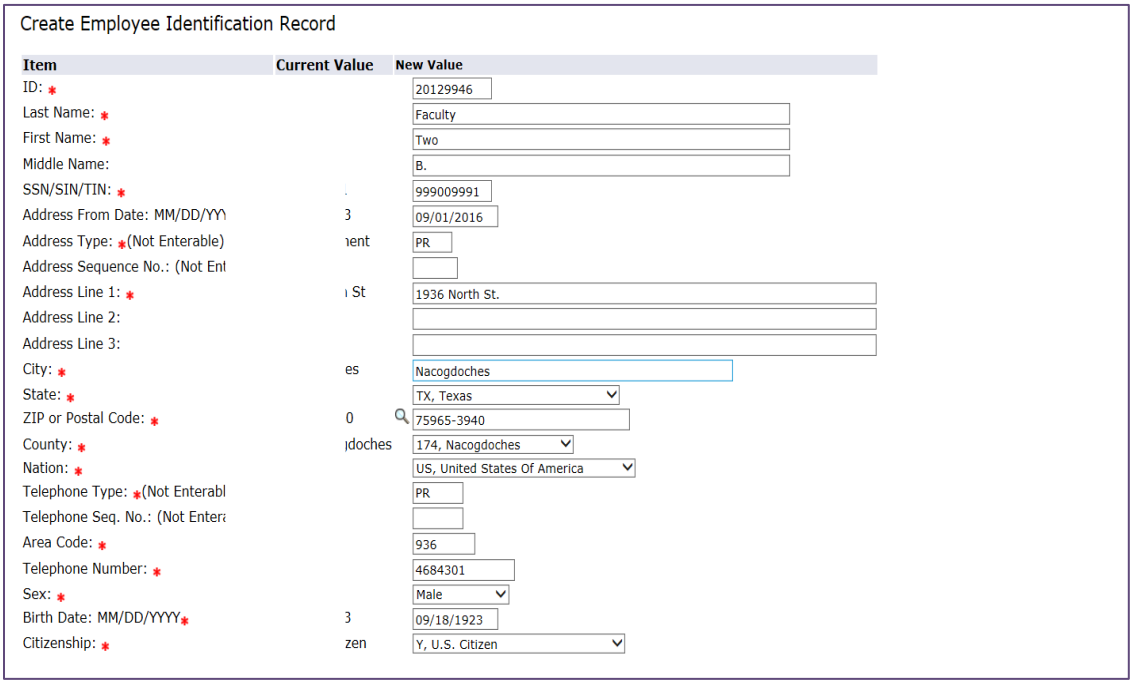
Address and Telephone Selection			
Select Address and Telephone	123 North Street Nacogdoches, TX 75961	936-1234567	**Note:** Select the correct address and telephone number for the new employee by choosing the radial button in the 'select" column to the right. Select 'go' to continue to the new EPAF selection section. **Note:** If the new employee does not have an address and telephone number in the system, or the information has changed, select the radial button to the right of 'new record'



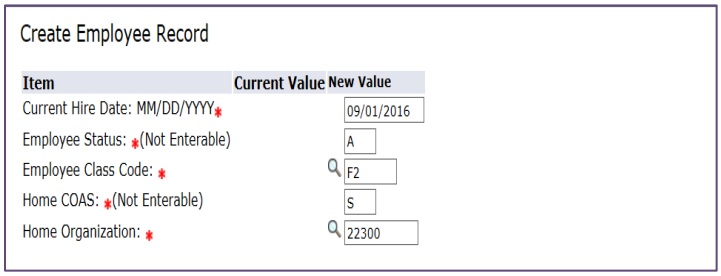
New EPAF Job Selection		
Enter Position Number	FXXXXX	Enter the new position number and suffix. Select this position number by choosing the radial button in the 'select' column to the right. Once position & suffix are entered, select 'next approval type'. Ensure the same position number is selected for each section. Once you have reached the 'labor distribution record' select 'go' to create new EPAF.
Suffix	00	**Note: '**00' is the standard suffix for all assignments unless given express instructions by Human Resources.



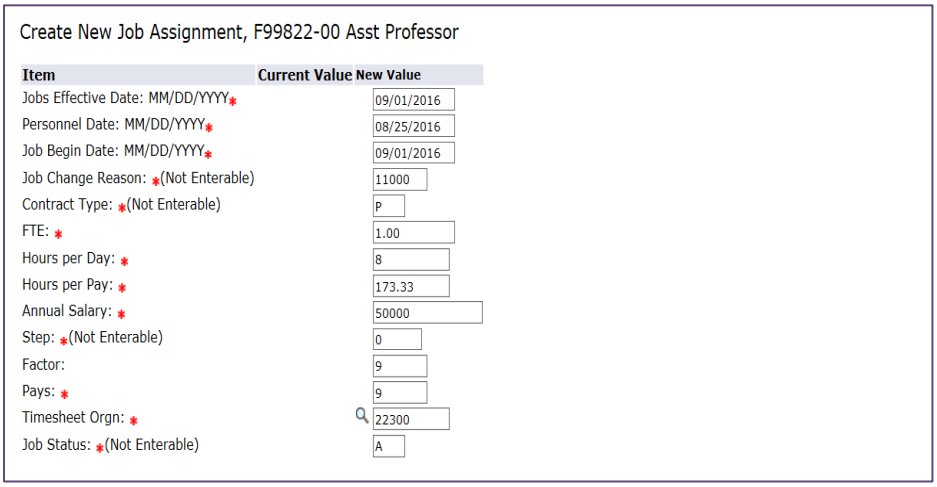
CREATE EMPLOYEE IDENTIFICATION RECORD		
ID	12345678	Defaults from name and ID.
Last Name	Smith	**Note:** Will not default. Must be entered
First Name	John	**Note:** Will not default. Must be entered
Middle Name	R.	**Note:** Will not default. Must be entered
SSN/SIN/TIN	123456789	**Note:** Do not use dashes
Address From Date	MM/DD/YYYY	Defaults from query
Address Type	PR	Permanent. Default. Not enterable.
Address Sequence No.		Default. Not enterable.
Address Line 1	123 North Street	**Note:** Do not use any special characters. Ex (-), (/), (#), etc.
Address Line 2		
Address Line 3		
City	Nacogdoches	**Note:** Do not abbreviate
State	Not Selected	Select the state
ZIP or Postal Code	75961	**Note**: Use only the 5 digit zip code here
County	Not Selected	**Note:** If this is NOT a Texas county, select '000, not a Texas county'
Nation	Not Selected	Select the nation
Telephone Type	PR	Permanent. Default. Not enterable.
Telephone Sequence No.		Default. Not enterable.
Area Code	936	
Telephone Number	1234567	**Note**: Do not include a "-" in the telephone number
Sex	Not Selected	Select the appropriate gender
Birth Date	MM/DD/YYYY	
Citizenship	Not Selected	**Note:** Contact HR for further instruction if there is a question about citizenship.



CREATE EMPLOYEE RECORD		
Current Hire Date	MM/DD/YYYY	Should reflect the query date
Employee Status	A	Active. Default. Not enterable
Employee Class Code	F2	**Hint: F2** = 100% FTE; **F3** = Anything less than 100% FTE
Home COAS	**S**	Default. Not enterable
Home Organization	12345	5-digit Org of employee's primary department.



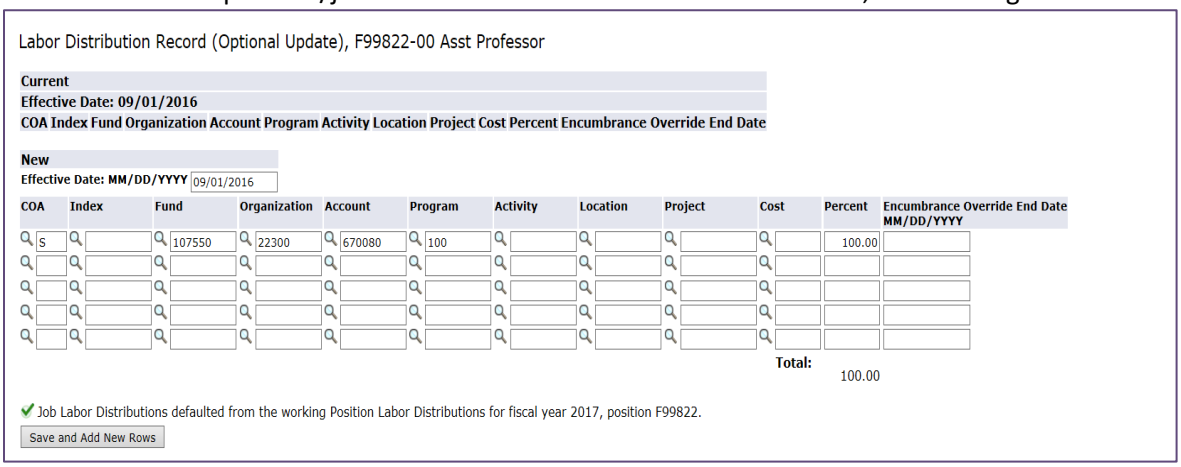
CREATE NEW JOB ASSIGNMENT		
Jobs Effective Date	MM/DD/YYYY	Defaults from query date.
Personnel Date	MM/DD/YYYY	Defaults from query date. **Note:** Refer to dates memo for correct personnel date on faculty
Job Begin Date	MM/DD/YYYY	Defaults from query date.
Job Change Reason	11000	Default. Not enterable.
Contract Type	P	Primary. Default. Not enterable.
FTE	1.0	Note: Expressed as a decimal, not a percent
Hours per Day	8	Hours/Day – Refer to FTE calculations
Hours per Pay	173.33	Hours/Pay – Refer to FTE calculations
Annual Salary	50000.00	**Note:** Do not include dollar signs ($) or commas (,).
Step	0	Default. Not enterable.
Factor	9	Default. May change depending on length of assignment. Contact HR before updating.
Pays	9	Default. Pays = Factor.
Timesheet Org	12345	5-digit Org of the department responsible for approving employee's time (via TimeClock or Leave Reporting).
Job Status	A	Active. Default. Not enterable.



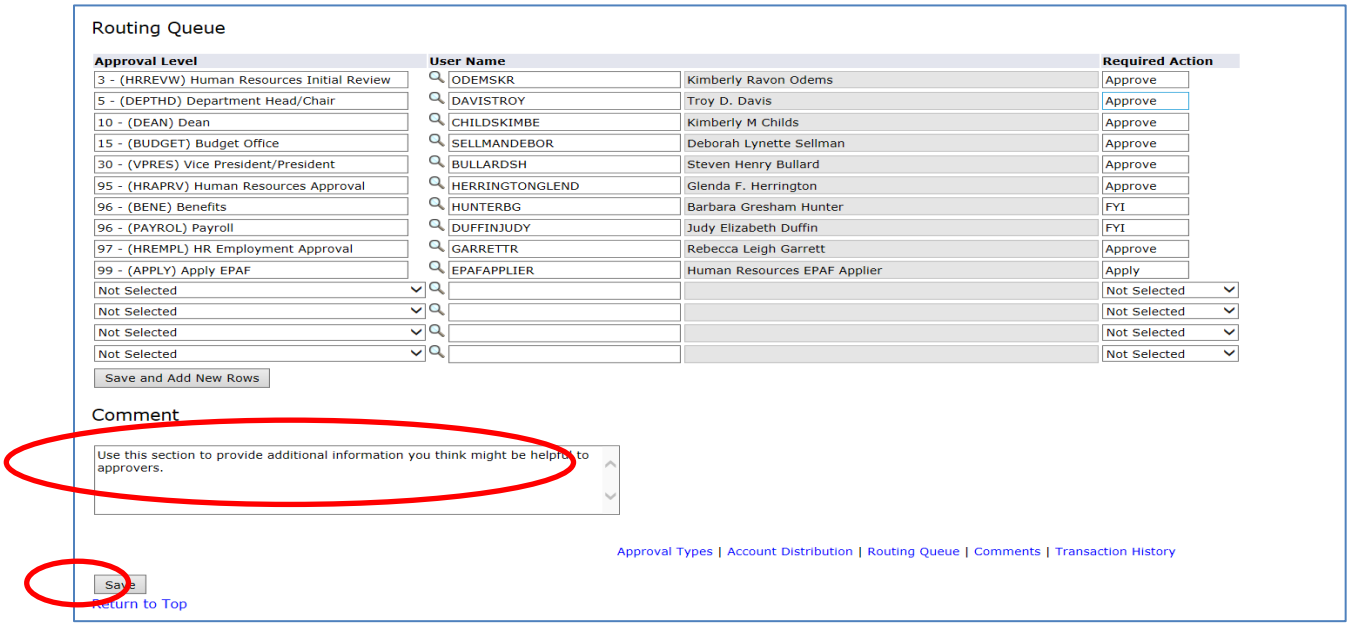
LABOR DISTRIBUTION RECORD						
Effective Date: MM/DD/YYYY			**Note:** Defaults from Query Date. Cannot change.			
COA	**Index**	**Fund**	**Organization**	**Account**	**Program**	**Percent**
S	(leave blank)	123456	12345	(Default)	123	100.00
			Include split funding on subsequent lines. Percent should total 100.00			
					Total	100.00

Note: If index defaults into the labor distribution record, highlight and delete the index before saving.

Hint: FOAP defaults from the position/job record. If the defaulted FOAP is incorrect, make changes where necessary



ROUTING QUEUE				
3	HRREVW	Human Resources Initial Review	Approve	**Note:** If the assignment is paid from grant funds, add lORSP approval Level.
5	DEPTHD	Department Head/Chair	Approve	**Note:** If you add an approval level to the routing queue, be sure to choose a required action on the far right side for each added.
10	DEAN	Dean	Approve	
15	BUDGET	Budget Office	Approve	
30	VPRES	Vice President/President	Approve	
95	HRAPRV	Human Resources Approval	Approve	
96	PAYROL	Payroll	FYI	
96	BENE	Benefits	FYI	
97	HREMPL	HR Employment Approval	Approve	
99	APPLY	Apply EPAF	Apply	



CHNG50: Change – Funding Source, Faculty & Staff

Purpose of this EPAF Approval Category

To change an employee's funding source and replace with a new funding source for a faculty or staff position.

Create EPAF

Note: Fields in gray are enterable.

New EPAF Person Selection		
ID	12345678	Enter employee's CID or search for CID. **DO NOT** generate new ID. Contact an HR EPAF Representative.
Query Date	MM/DD/YYYY	Use the date the change is 'effective.' **Note:** Subsequent dates within this EPAF will default from the query date entered. You will be required to re-create the EPAF if the Query Date is not correct. **Note:** System defaults current date. Will need to correct. **Hint:** Semi-monthly employees will almost always be effective on the 1st or 16th of the month. Monthly employees will almost always be effective on the 1st of the month. This will allow the change to begin at the beginning of a Pay Period.
Approval Category	CHNG50	**Hint:** Once the approval category is selected, you can select the 'all jobs' button to see all of the employee job assignments as of the query date. Once you have the correct approval category and query date, select 'go' **Note:** If the employee's pay or FTE will be changing with the funding source, please refer to the **CHNG50**, **CHNG56**, **CHNG57**, or the **CHNG58**
New EPAF Job Selection		
Enter Position Number	NXXXXX	Select the employee's position that you will be changing by choosing the radial button in the 'select' column to the far right. Once position & suffix are selected, click 'go' to create new EPAF.
Suffix	00	**Note: '**00' is the standard suffix for all assignments unless given express instructions by Human Resources.

LABOR DISTRIBUTION RECORD

Effective Date: MM/DD/YYYY			**Note:** Defaults from query date. Cannot change.			
COA	**Index**	**Fund**	**Organization**	**Account**	**Program**	**Percent**
S	(leave blank)	123456	12345	(Default)	123	100.00
			Include split funding on subsequent lines. Percent should total 100.00			
					Total	100.00

Note: If index defaults into the Labor Distribution Record, highlight and delete the Index before saving.

Hint: FOAP defaults from the position/job record. If the defaulted FOAP is incorrect, make changes where necessary

ROUTING QUEUE

3	HRREVW	Human Resources Initial Review	Approve
5	DEPTHD	Department Head/Chair	Approve
15	BUDGET	Budget Office	Approve
30	VPRES	Vice President/President	Approve
95	HRAPRV	Human Resources Approval	Approve
96	PAYROL	Payroll	FYI
99	APPLY	Apply EPAF	Apply

Note: If the assignment is paid from grant funds, add ORSP approval level.

Note: If the Dean requires notification, add the DEAN Approval level.

Note: If you add an approval level to the routing queue, be sure to choose a required action on the far right side for each added.

WebFocus – Employee Status Report Instructions

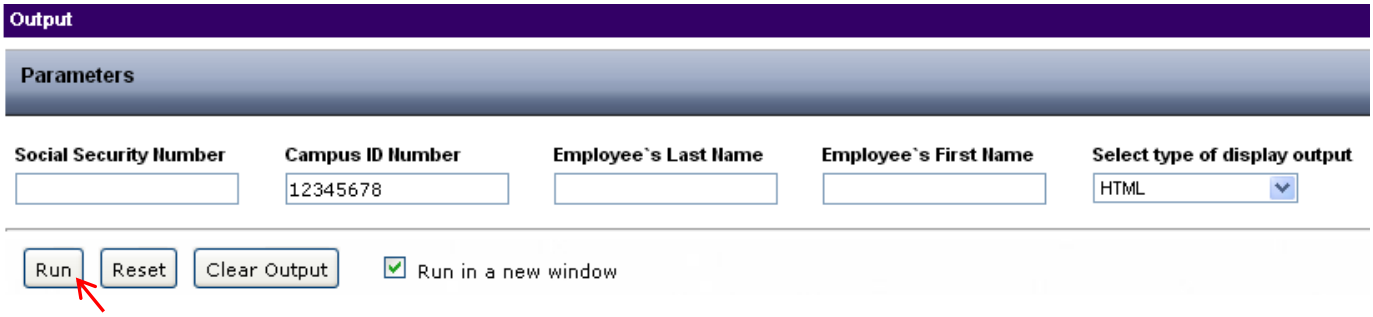
Purpose:

To provide accessible information to authorized employees regarding an employee's job assignment status. This report enables the user to view all previous and current assignments held by a specific employee. This information will assist departments in completing Electronic Personnel Action Forms (EPAF's) and various other related tasks.

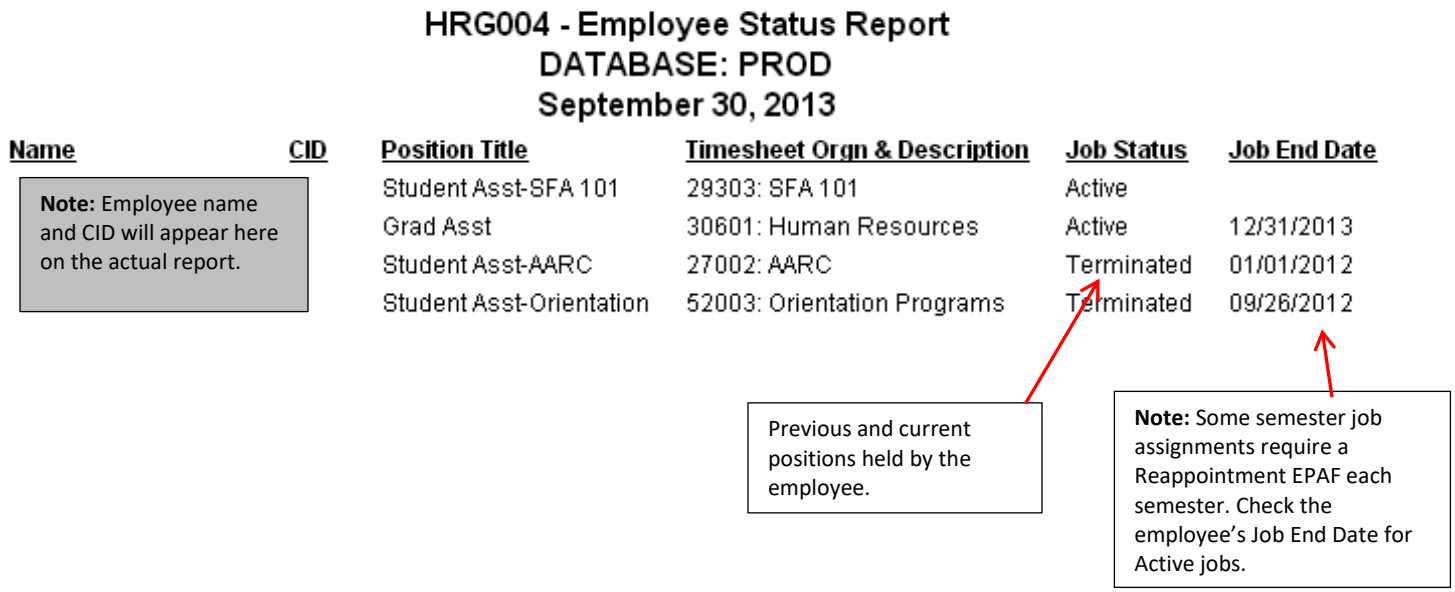
Instructions:

1. Log into WebFocus (https://webfocus.sfasu.edu/ibi_apps/bid-login?) and select the view "Human Resources – General."
2. Select the Departmental Listing report – titled "**hrg004_employee_status**."

3. Enter the applicable parameter(s) to search for an employee. Note that the report will not return social security numbers. The parameter is available to search for an employee's Campus ID. After entering the applicable parameter(s), click "Run."



Interpreting the WebFocus Report:



HRG004 - Employee Status Report
DATABASE: PROD
September 30, 2013

Name	CID	Position Title	Timesheet Orgn & Description	Job Status	Job End Date
		Student Asst-SFA 101	29303: SFA 101	Active	
		Grad Asst	30601: Human Resources	Active	12/31/2013
		Student Asst-AARC	27002: AARC	Terminated	01/01/2012
		Student Asst-Orientation	52003: Orientation Programs	Terminated	09/26/2012

Note: Employee name and CID will appear here on the actual report.

Previous and current positions held by the employee.

Note: Some semester job assignments require a Reappointment EPAF each semester. Check the employee's Job End Date for Active jobs.

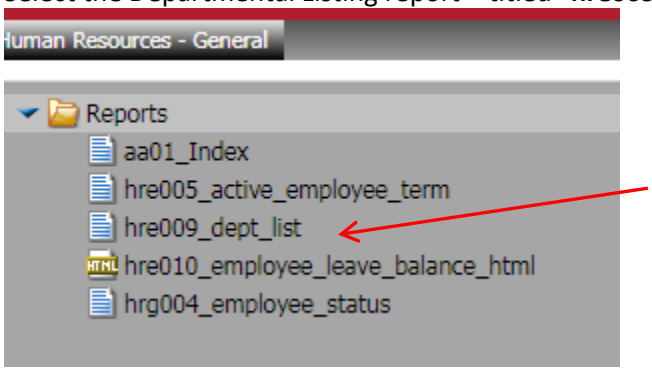
WebFocus – Department List Report and Employee Status

Purpose:

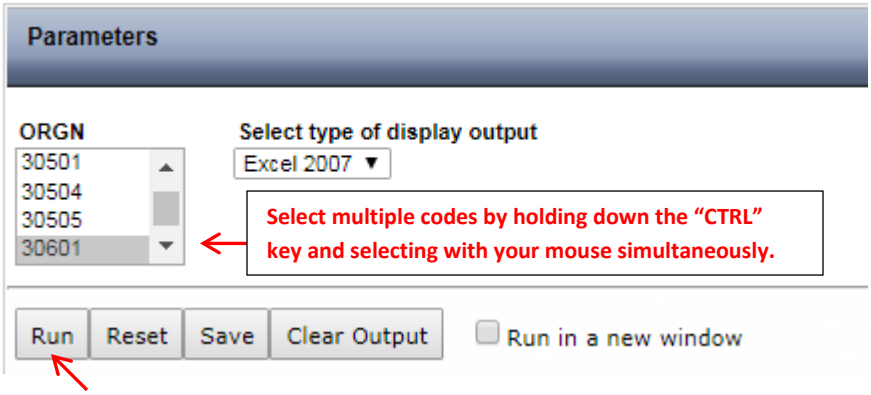
To provide accessible information to authorized employees regarding employee class, position numbers, job titles, and incumbent names for their specific department. This information will assist departments in completing Electronic Personnel Action Forms (EPAF's), job postings through PeopleAdmin, determining job budget availability, determining funding sources and various other related functions.

Instructions:

4. Log into WebFocus (https://webfocus.sfasu.edu/ibi_apps/bid-login?) and select the view "Human Resources – General."
5. Select the Departmental Listing report – titled "**hre009_dept_list**."



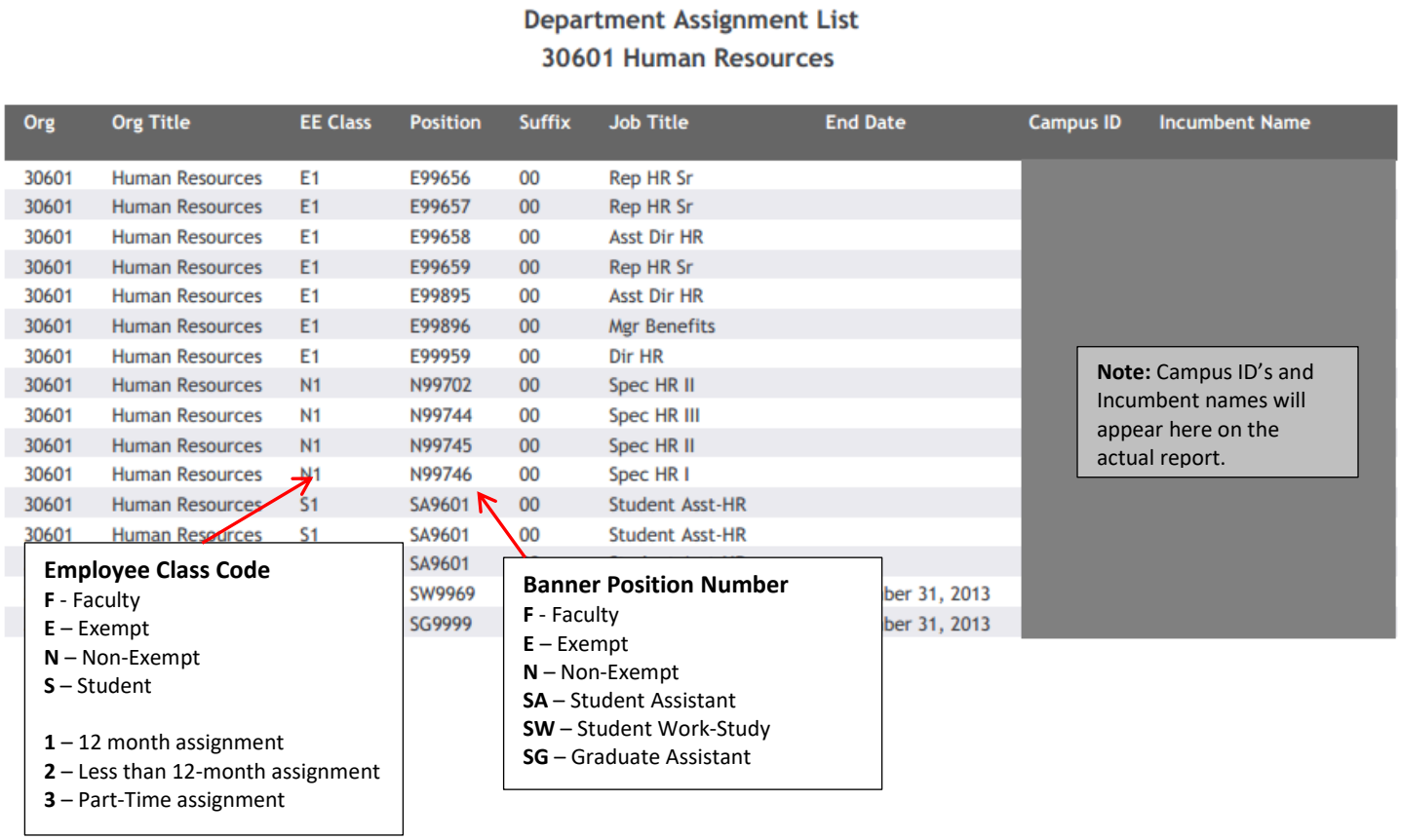
6. Select your department's 5-digit code from the parameters menu. To select multiple 5-digit codes at once, hold the control key and click all of the applicable codes.
7. Select the type of display output (PDF, Excel, or HTML) and click "Run" to execute the report.



Interpreting the WebFocus Report:

The report will return a list of all the active and vacant positions that are tied to a budget (i.e. FOAP number) for the selected 5-digit organization code(s).

Vacant positions are positions without an incumbent. The positions that appear on the report can be filled, depending on the budget's availability. If there is a position number that is not listed, or you are unsure of a position's funding, confirm the information with the Budget Office before proceeding.



Department Assignment List
30601 Human Resources

Org	Org Title	EE Class	Position	Suffix	Job Title	End Date	Campus ID	Incumbent Name
30601	Human Resources	E1	E99656	00	Rep HR Sr			
30601	Human Resources	E1	E99657	00	Rep HR Sr			
30601	Human Resources	E1	E99658	00	Asst Dir HR			
30601	Human Resources	E1	E99659	00	Rep HR Sr			
30601	Human Resources	E1	E99895	00	Asst Dir HR			
30601	Human Resources	E1	E99896	00	Mgr Benefits			
30601	Human Resources	E1	E99959	00	Dir HR			
30601	Human Resources	N1	N99702	00	Spec HR II			
30601	Human Resources	N1	N99744	00	Spec HR III			
30601	Human Resources	N1	N99745	00	Spec HR II			
30601	Human Resources	N1	N99746	00	Spec HR I			
30601	Human Resources	S1	SA9601	00	Student Asst-HR			
30601	Human Resources	S1	SA9601	00	Student Asst-HR			
			SA9601					
			SW9969			ber 31, 2013		
			SG9999			ber 31, 2013		

Note: Campus ID's and Incumbent names will appear here on the actual report.

Employee Class Code
F - Faculty
E – Exempt
N – Non-Exempt
S – Student

1 – 12 month assignment
2 – Less than 12-month assignment
3 – Part-Time assignment

Banner Position Number
F - Faculty
E – Exempt
N – Non-Exempt
SA – Student Assistant
SW – Student Work-Study
SG – Graduate Assistant

Frequently Asked Questions Regarding EPAFs

General Questions:

Q Does the originator have to select all of the approvers on each EPAF?

A Yes, the originator will select all the required approval levels which are defaulted in each EPAF Approval Category. The approval routing queue will change based on the EPAF Approval Category selected. For example, there are far less required approvers on student EPAFs than for staff or faculty EPAFs. If the position is paid from a grant account, ORSP approval must be added to the EPAF. Also, if your department has a Dean, s/he will need to be added if they are not already listed.

Q I work in a department under a Dean. How do I know when to add the Dean approval to the routing queue?

A If an EPAF requires a Vice President approval, you will need to add a Dean approval as well. If the EPAF does not require a Vice President approval, HR will not require a Dean approval. However, you may want to discuss whether your Dean wants to approve or receive an FYI on different EPAF Approval Categories.

Q Does the EPAF need to be printed in academic departments for SACs purposes?

A It is not necessary to print the EPAF as it will be available electronically in the event that a copy is required to be produced for SACs or other purposes.

Q If we can't change the override able fields, why are they showing up on the form?

A The fields which cannot be overridden are there to tell the system important information that has either been pre-populated for you or has been left blank on purpose.

Q Can an EPAF be corrected at any point along the approval process and how does that work?

A Any of the approvers in the routing queue can edit the EPAF which will then be sent through the routing queue again for a second approval. If the EPAF has already been applied to the system by HR, the department should contact HR if a correction needs to be made.

Q If the EPAF needs to be corrected, will it be sent back to the originator?

A When an EPAF is returned for correction, the originator will be notified by email. The originator will need to go into their Originator Summary to view the EPAF comments and make any necessary changes. When the EPAF is re-submitted, it will go back through the routing queue for approvals.

Q If I am an approver, should I set up a proxy even though I don't anticipate being out of the office?

A Yes. It is always wise to pre-set a proxy in the event of an emergency. Please note that HR cannot setup proxies for approvers. Each approver is responsible for maintaining who should be able to have access to their EPAFs and who can act on their behalf.

Q As an originator, will I get an email to inform me when the EPAF has been applied?

A Yes, originators will receive email notifications when each EPAF is returned for correction, disapproved, or completed/applied to the system. You can view the routing queue to see the progress of the EPAF as it is routed to completion.

Q I am a department head and I report to a Chair who reports to a Dean. Since there are two "department heads", how do I setup the routing? Will we both get to approve it? (ECH Lab, Charter School, etc.)

A If you and your supervisor are both considered "Department Heads" in the routing queue, you will both need to approve the EPAF as DEPTHD. In order to do this, select yourself as the required DEPTHD approver, then add another DEPTHD approver and select your supervisor. The EPAF will require both approvals before routing to the next level.

Q On the "Approver Summary", what does the "Action" box do?

A Approvers can use the action box to quickly approve or acknowledge EPAFs in their current tab. When the "Action" box is checked and the Approver saves the page, the EPAF is approved/acknowledged and is sent to the next approval level. It is NOT advised to use the action box to approve EPAFs. Each approver should review the EPAF before approving.

Q If you hire a person and they change their start date, what do you do to correct the date?

A If the EPAF has not yet been applied, you may contact the next approver to send the EPAF back for corrections. If the EPAF has already been applied, the department must contact HR. HR must delete the job and then the department must submit a new EPAF with the correct hire date.

Q Our department reports directly to the President, how do we do our routing?

A Routing for departments reporting directly to the President are the same as those reporting through a Vice President. The VPRES approval level represents both Vice president and President approval. Simply select the President as the approver.

Q Will grant jobs have end dates?

A When hiring an employee on a grant account, you will not be able to put an end date on the "Hire" EPAF as there is no place to put an end date. You will need to prepare a "Separation" EPAF at the end of the grant period to end the employment of the grant employee. Grant employee processing is the same as non-grant employees apart from the requirement of ORSP approval in the routing. It is recommended to include a comment stating the projected funding end date.

Q Do we have to send actions on Graduate Assistants through the Graduate Office?

A Yes, all employments, changes, and terminations on Graduate Assistants must be approved by the Graduate Office.

Student Questions

Q How do the dates on Student Cards coordinate with the dates in EPAF? Should they be the same dates?

A Non-work study Student Assistants are hired and will stay employed until you end their assignment or end their employment. If you hire a student assistant for one day, you will need to do a "Hire" EPAF and then do a "Separation" EPAF to either end their assignment or end their employment.

Q Since all of the work study students have their work assignments set for each semester, or for both summer semesters, should they be "newly hired" at the beginning of the semester and terminated only at the end of the semester? (In the case of the summer semesters, terminated at the end of summer II?)

A Work study EPAFs (whether using "Hire" or "Additional Job") have both begin and end dates. New EPAFs will need to be completed every semester for work study jobs. If the student does not have any active job assignments, you will select the "Hire" EPAF Approval Category. If the student has an active job assignment already, you will select the "Additional Job" EPAF Approval Category.

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Q Do student assistants (non work study) have end dates in the new system? Will we need to re-employ them each semester?

A When hired in your department, the student assistants will not have assignment end dates. The assignment will remain active until a "Separation" EPAF is submitted to either end the assignment or end the student's employment. You do not need to separate a student between semesters or over the summer if you have reason to believe the student will continue working for you. However, it is vital that separation EPAFs be completed in a timely manner. As soon as you know a student assistant will no longer be working for you, a "Separation" EPAF should be completed. Additionally, departments still need to complete the Administrative Account Disablement Form.

Q Do we need to terminate student assistants and rehire them every year?

A A student can have an active assignment for as long as they work for you. You will not need to complete an "End Assignment" or "End Employment" EPAF until the student is no longer employed by your department.

Q Will I be able to see every job a student may have when I am trying to employ them?

A Yes, you should be able to see all their current and past assignments based on the query date you enter. To view inactive job assignments, click on the button "All Jobs" when in the job selection screen.

Q How does a department hire a student and pay them from different accounts?

A You should be able to use one EPAF to hire a student and break down the labor distribution to pay them from different FOAPs. As a reminder, if any of the accounts are funded by grants, you must include ORSP as an approver on the routing queue.

Q How will student employees and work study students get entered into TimeClock Plus?

A Student assistants and work study student assistants will be loaded into the TimeClock Plus system on a nightly basis. When you receive the email notification that the EPAF has been completed and applied to the system, you can expect to see the student's assignment in the Time Clock Plus system the next morning.

Q What happens when a work study student runs out of the money authorized on the EPAF by Financial Aid? How will we know when that happens?

A It is the Department Head's responsibility to track the amount of money that has been used by the work study student and know when the maximum amount has been reached. When the maximum has been reached, the department must contact HR to terminate the work study student with a new effective date and may re-employ them as a student assistant (on a new EPAF) if funds are available.

Q Are our current student assistants going to already be set up in Banner with an assignment, or will we have to do an EPAF to employ them? What about work study students?

A Student Assistants who are on the payroll effective December 1, 2010 will already be in the system and you will not have to complete an EPAF to hire them. Work study student assistants will NOT need to have a "Separation" EPAF completed for the end of the semester (December 31, 2010) as the end date has already been loaded for this semester.

Faculty Questions

Q My training manual has instructions on completing a Faculty Overload EPAF, but I do not see it on the drop-down list of approval categories. How do I submit this?

A Due to the complexity of how the system will handle these assignments, we have decided not to implement EPAFs for faculty overloads, salary supplements, or additional compensation. The department should complete the appropriate paper form found on the HR website and route through the appropriate channels. If EPAFs for these assignments are implemented, the campus will be notified.

Q The Budget Office always changes the faculty start date for new hires to September 1st. Should we use that date at the beginning of the fall semester even though the faculty member actually starts in August?

A The Budget Office prefers that you use September 1 for the start date of newly hired faculty for the fall semester. The dates of the fall semester are September 1 through December 31. The dates of the spring semester are January 1 through May 31. Nine (9) month appointments are from September 1 through May 31.

Q When separating a faculty member at the end of a semester, should we use the end of the month or the end of the semester?

A Please use the end of the month to end a faculty assignment at the end of a semester.

Q When adjunct faculty and graduate assistants have worked in the spring semester and will not be working during the summer months, will I need to do some sort of EPAF to show that they will not be working, but are planning to come back in the fall?

A If the department knows that the adjunct faculty member or graduate assistant is returning in the fall, the department will need to do a "Leave without pay" EPAF for the summer months. At the end of the summer, if the faculty member or graduate assistant does not come back for the fall semester, the department must prepare and submit an EPAF to terminate their employment and will need to complete the "Administrative Account Disablement Form". If the faculty member or graduate assistant is coming back in the fall, the department will need to do an "End Leave without Pay" EPAF to bring them back into an active assignment. Reminders will be sent in May and August to ensure assignments are accurate in the system and faculty and graduates are paid appropriately.

Grant Related Questions

Q I have to prepare an EPAF to hire an employee on a grand funded job, do I need to put in an end date for that job?

A When hiring an employee on a grant account, you will not be able to put an end date on the EPAF. You will need to prepare a "Separation" EPAF at the end of the grant period to end the employment of the grant employee. Grant employee processing is the same as non-grant employees apart from the requirement of ORSP approval in the routing. It is recommended to include a comment stating the projected funding end date.