

# ELECTRONIC PERSONNEL ACTION FORM (EPAF)

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Faculty EPAF Process

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# Agenda

- Why is this training important?
- Learning objectives
- What is an EPAF?
- Who creates an EPAF?
- Why should an EPAF be submitted?
- How & when is an EPAF completed?
- Practice!

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WHY IS THIS TRAINING  
IMPORTANT?

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# Priority to pay people appropriately

- 2,700 EPAFs/\$16M in FY17 for Academic Affairs
- Each EPAF action has a minimum of:
  - 1 originator + 1 departmental approver +1 AA/HR approver + 1 Fund approver = ...
  - **4 people** with responsibility for a single action
  - Multiply those “touches” by the number of times the EPAF gets returned
- **All that work adds up *FAST*...and returns create churn for us all**

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# LEARNING OBJECTIVES

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# Learning Objectives

- ***At the end of this training you will:***
  - Collect and prepare EPAF details early
  - Review details for accuracy, completeness, and compliance using critical thinking
  - More efficiently navigate EPAF elements
  - Use appropriate routing queues for varied actions
  - Minimize the number of errors and “return churn”
  - Know and contact the appropriate subject matter expert, beginning with your Business Officer

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# WHAT IS AN EPAF?

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# What is an EPAF?

- Electronic Personnel Action Form
- Streamlined method for submitting personnel actions electronically
- EPAFs replaced the paper-based PD-7 for *temporary pay* actions
  - Part Time Faculty Hires
  - Special Payments (EHRA Staff or Faculty)



# Why use an EPAF?

## *Efficiency, Transparency*

- Data entry in your control: second-level data entry not needed & error-risk reduced
- Routed electronically: no “lost” paperwork or “looking” for your forms
- Transparent workflow: see approver-level status
- Reduced time getting actions approved between levels and routed into Banner



# Why use an EPAF? *Temporary Pay* to EHRA faculty or EHRA staff

- Hiring adjunct / part-time faculty as *temporary* employees
- Full-time EHRA faculty or EHRA staff performing duties outside their normal position duties and/or department—
  - One-time special payment; a temporary pay, never added to permanent base salary
  - EHRA staff teaching a course for credit



# EPAFs Allow Users To:

Enter personnel  
payment actions  
to upload into  
Banner

Automatically  
routes actions  
for approval

Track actions as  
they flow  
through the  
process

Disapprove or  
return personnel  
actions that  
need corrections

View a one year  
history of all  
personnel  
actions

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# EPAF BASICS

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# EPAF Roles

## Originator

- The person who creates the EPAF

## Approver

- Reviews and Approves (or disapprove) EPAF
- Can return to the Originator for correction or forward to next Approver

## Proxy

- Someone who has been delegated proxy access by an approver and has the same authority as the approver in making decisions on personnel transactions

## FYI

(For Your Information)

- Only views the details of an EPAF

## Applier

- An HR user who applies the EPAF data to Banner
- Final Step in EPAF process

# Originator Responsibilities

- Gather all information needed to create an EPAF
  - Seek further details/rationale, if needed
  - Communicate delays or changes directly to requestor
- Ensure detail/action is allowable (compliance)
- Identify approvers in the routing queue for your department or area
- Determine if other approvers outside of the mandatory routing queue need to be added
  - Add “Grants & Contracts Administration” approver to grant-funded actions
- Monitor approval status to prevent delays



# Approver Responsibilities

- Review all information in an EPAF for accuracy
- Approve, disapprove or return an EPAF for correction.
- Contact the Initiator of the EPAFs you are not approving to explain your action.
- Approve your EPAFs in a timely manner.
- Set up Proxy Approver access as soon as possible.



# EPAF Approver Buttons

- **“Approve”**
  - Forwards the EPAF to the next level and attaches your “signature” electronically
- **“Disapprove”**
  - Cancels the EPAF transaction and removes it from the approval routing queue
- **“Return For Correction”**
  - Sends an EPAF back to the Originator to be corrected and removes it from the approval routing queue

# Proxy Approver

- An approver who is given access to approve EPAFs for someone else
- A proxy has the same level of authority in approving personnel transactions as the approver who delegated the proxy access.
- Proxies are only set up for Approvers, not for Originators.

# The Proxy Process?

- Approvers set their proxies by using the “EPAF Proxy Records” link on the main menu.
- Proxy approvers use the “Act as a Proxy” link on the menu to take action on an EPAF.
- The name of the proxy approver, date and time are displayed in the EPAF Summary section, when a proxy approves an EPAF.

# What Cannot Be Done on EPAFs?

- You cannot update employee positions.
- You cannot change a job assignment
- Changes are still processed on a superseding PD-7
- You must continue to use the PD-7 for actions not available on EPAFs.

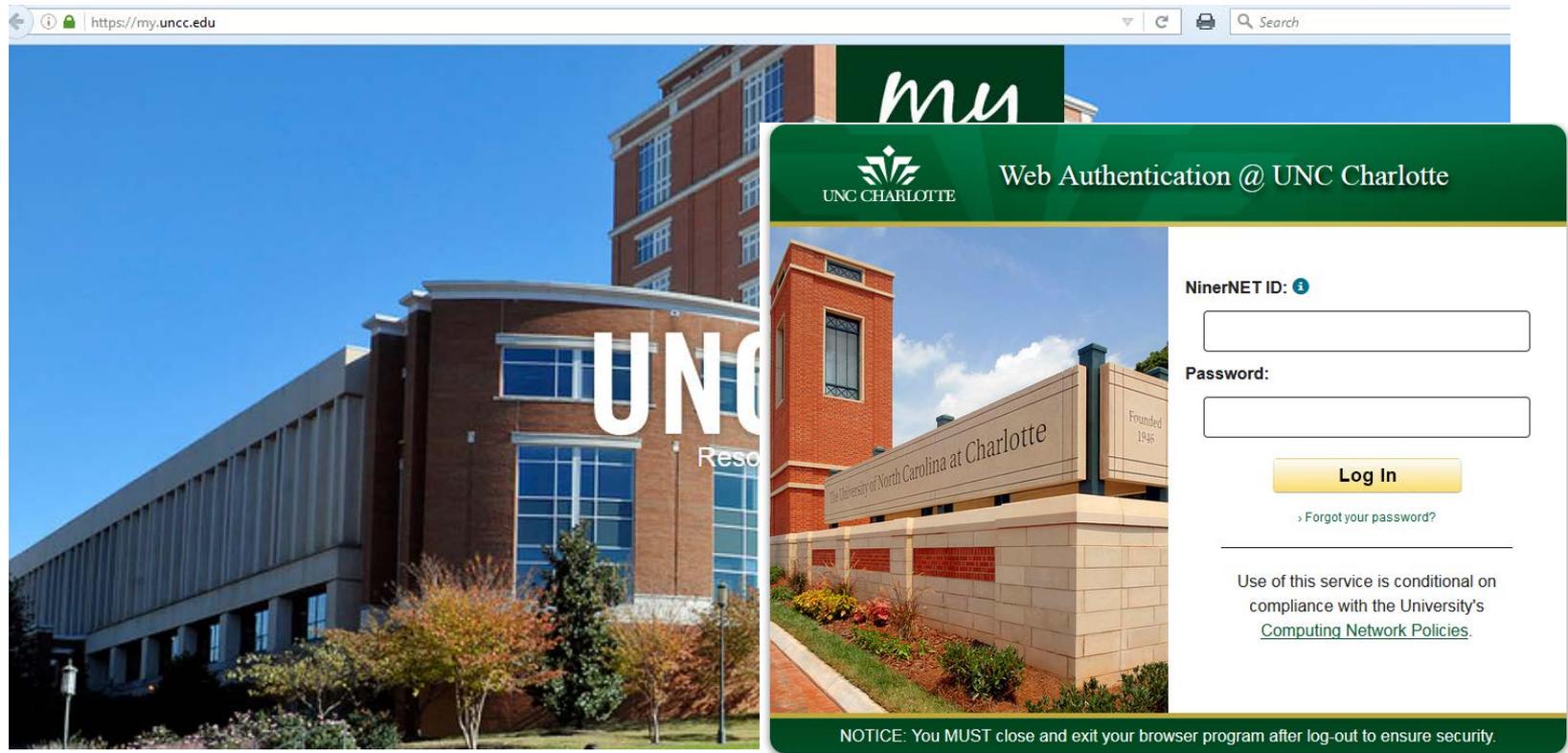
# How to Get EPAF Access

- A business manager or supervisor must fill out the EPAF request form: <https://hr.uncc.edu/webform/epaf-access>

# LOGGING IN

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# How do I login?



The image shows a screenshot of a web browser displaying the login page for my.uncc.edu. The browser's address bar shows the URL https://my.uncc.edu. The page features a large background image of a brick building with the text 'UNC' and 'Reso' overlaid. A green banner at the top right of the page contains the 'my' logo and the text 'Web Authentication @ UNC Charlotte'. Below this banner, there is a form with two input fields: 'NinerNET ID:' and 'Password:'. A yellow 'Log In' button is positioned below the password field. A link for 'Forgot your password?' is located below the button. At the bottom of the page, a green banner contains the text: 'NOTICE: You MUST close and exit your browser program after log-out to ensure security.'

Log in to [my.uncc.edu](https://my.uncc.edu) using your NinerNet ID and password.

# How do I login? cont.

MY UNC CHARLOTTE *my* Student **Employee** Faculty Log out

## EMPLOYEE ESSENTIALS

Calendar Moodle Dining Info Search Campus Directory 49er ID Card Campus Map 49er Mart

### Banner Self Service

- Self Service Main Menu
- » [Pay Stub](#)
- » [Web Time Entry](#)
- » [Direct Deposit](#)
- » [Current and Past Jobs](#)
- » [Leave Balances and History](#)
- » [Elected Benefits and Deductions](#)
- » [Tax Information](#)
- » [View Addresses and Phones](#)

### Tools and Resources

- » [Password Manager](#)
- » [Online Computer Training](#)
- » [HelpDesk Online](#)
- » [ITS System Status](#)
- » [Internet Native Banner - INB \(Remote Access\)](#)
- » [Office Applications \(Citrix\)](#)
- » [Report Express](#)
- » [Report Central](#)
- » [Kronos Workforce Ready Login](#)
- » [Intouch Clock UNC Charlotte Locations](#)
- » [HR Training Courses completed](#)

### Spotlight

**Dropbox**  
Dropbox cloud storage is now available.

### Employment & Benefits

### Campus Services

### Academic Calendar

# How to get to the EPAF Menu?

The screenshot shows the Banner Self Service @ UNC Charlotte website. The top navigation bar includes the UNC Charlotte logo and the text "Banner Self Service @ UNC Charlotte". Below this, there are several tabs: "PERSONAL INFORMATION", "STUDENT SERVICES / STUDENT ACCOUNTS", "EMPLOYEE", and "EMPLOYEE". The "EMPLOYEE" tab is highlighted with a green bar. A speech bubble points to this tab with the text "Employee Tab".

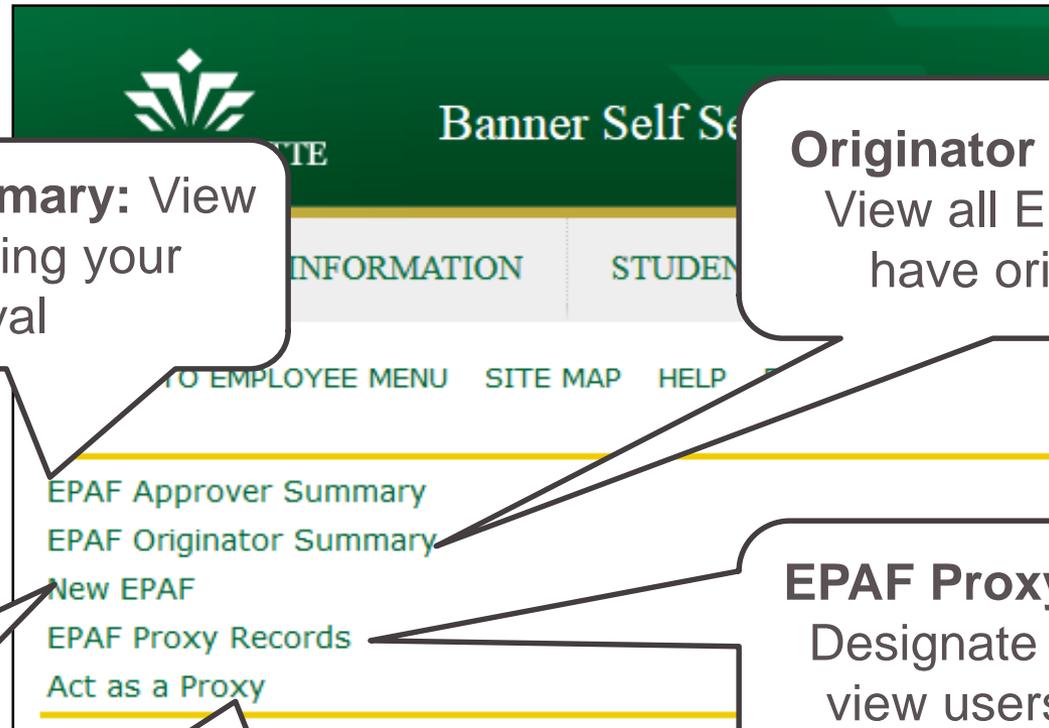
Below the navigation bar, there are links for "RETURN TO MENU", "SITE MAP", "HELP", and "EXIT". The main content area is titled "Employee Information" and contains several menu items:

- Benefits and Deductions  
View your retirement plans, Health insurance information, NC Flex information, and miscellaneous deductions.
- Pay Information  
View your Direct Deposit Payment details; View your Earnings and Deductions History; View your Pay Stubs; Establish or change Direct Deposit Enrollment.
- Tax Information  
View W-4, NC-4 and Year Earnings and W-2 information.
- Current and Past Jobs as of July 1, 2005
- Time Off Current Balances and History
- Time Sheet
- Web Time Entry (WTE) (WTE Training Materials)  
*Web Time Entry is now fully implemented for student and non-tenured hourly employees.*
- EPAF - Electronic Personnel Action Form**  
Electronic Personnel Action Forms for Temporary Faculty, Special Pays, Student Temp Wage (limited use)
- Human Resources Training Courses completed
- Confidentiality Agreement

A speech bubble points to the "EPAF - Electronic Personnel Action Form" item with the text "Click EPAF – Electronic Personnel Action Form".

- Select the Employee tab
- Then choose EPAF–Electronic Personnel Action Form

# EPAF Menu



**Approver Summary:** View EPAFs needing your approval

**Originator Summary:** View all EPAFs you have originated

**New EPAF:** Create a new EPAF

**EPAF Proxy Records:** Designate a proxy or view users who are listed as your proxy

**Act as a Proxy:** Log in as a proxy to approve an EPAF

# Originator & Approver Summary

## Originator Summary

**Current** tab: EPAFs you need to correct (Originator) or approve (Approver). Similar to an “inbox”

The screenshot shows the Originator Summary interface. At the top, there are two tabs: 'Current' (highlighted in blue) and 'History' (greyed out). Below the tabs, there is a message: 'Select the link under Name to access details of the transaction'. At the bottom, there is a 'Transaction Status' filter with a dropdown menu set to 'All' and a 'Go' button.

**History** tab: EPAFs that have been completed.

## Approver Summary

**In My Queue**: EPAFs that you will need to approve, but are not to that point yet.

The screenshot shows the Approver Summary interface. At the top, there are three tabs: 'Current' (highlighted in blue), 'In My Queue' (greyed out), and 'History' (greyed out). Below the tabs, there is a message: 'Select the link under Name to access details of the transaction'. At the bottom, there is a 'Queue Status' filter with a dropdown menu set to 'All' and a 'Go' button.

# Originator & Approver Summary

Current In My Queue History

Select the link under Name to access details of the transaction.

Name, UNCC ID, and position number

EPAF Status

View Comments

Select All Save  
1 - 5 of 5  
Jump to Bottom

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
EPA Staff Perm Special Payment, ESPE45-01	800	133254	Special Payment for Full Time Employee	Oct 19, 2017	Jan 01, 2018	Approve	<input type="checkbox"/>	<a href="#">**Comments</a>

Type of EPAF and Transaction Number

The Effective date: the 1<sup>st</sup> day of the payroll cycle the employee will be paid

# Transaction Status in the Summary

Transaction Status	Definition. <i>The EPAF has been or is:</i>
Approved	Approved by all approvers in the routing queue, but has not been applied to Banner by Human Resources; it will not trigger pay, yet.
<b>Complete</b>	<b>Applied to Banner by Human Resources and will be paid.</b>
Disapproved	Disapproved by an approver in the routing queue.
Pending	Waiting for the next approver in the queue to take action.
Return for Correction	Returned to the originator for correction by an approver in the routing queue.
Void	Voided by the originator.
Waiting	Not submitted yet and is in the process of being created. Another person cannot access the record.

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# HOW TO CREATE AN EPAF

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# EPAF Categories

Hire Part Time  
Faculty,  
E50PTF

- Used to hire Adjunct / Part-time Faculty

Special  
Payment for  
Full Time  
Employee,  
E45SP

- Use if a full-time employee member is getting additional compensation



# Before entering an EPAF think about this!

## What is today's date?

- EPAF deadlines are:
- 1<sup>st</sup> day of month to be paid in the 15<sup>th</sup> payroll
- 16<sup>th</sup> of the month to be paid in the End of the Month payroll

## Payroll deadlines

- Is this EPAF going to get approved before the payroll deadline?

## Is the employee full time or part time?

- Full time faculty receive special payments. Part time don't.

## Is an Approver out of the office?

- If the approver is out of the office the EPAF may not be approved in time

# Compliance Considerations:

## Questions to ask yourself

- **Is this faculty member 9 mos or 12 mos?**
  - There are very few situations where 12 mos can receive special pay.
- **Am I paying someone who is EHRA Staff?**
  - Have you checked with Sarah Ekis to make sure they **can** be paid a special pay for this work?
  - Do you have documentation confirming supervisor approval?
    - Supervisor statement confirms there is no “standard work day” time conflict; if the special pay job occurs during the work day, then supervisor describes when/how the staff member will complete regular duties.
    - Supervisor approval signals there is no perceived conflict of effort, either. This means the special pay job will not interfere with the overall productivity of the staff member.
- **Am I paying someone outside of my college/unit?**
  - Have you reached out to ensure you can pay that person for the work?

**PLEASE MAKE SURE YOU KNOW YOU CAN PAY SOMEONE BEFORE THEY START THE WORK.**

# Compliance Considerations:

## Questions to ask yourself

- **Have I checked to make sure that you are using a unique suffix?**
  - Check “all jobs” and check NBAJOBS in Banner
- **Is all of the information an approver needs to review for this action entered on the EPAF form?**
  - Title describes work being done for extra pay; is not the full-time title
  - Comments include a detailed explanation of when the work is being done, what the work is, and how/why the work is not a part of standard duties for the person being paid
  - Query and personnel dates match the description of work dates (see Camtasia video on AABP website, the “matching principle”)
- **Who “owns” the position and who is the fund owner that is responsible for this pay?**
  - If those are two different people, then you will need two different departmental approvers. Add “Grants & Contracts”, as needed.

# Compliance Considerations:

## Questions to ask yourself

- **When is the work being done?**
  - If summer, consider the “faculty 3/9ths rule” and make sure your area is aware of all, cumulative, pays the faculty member is receiving
    - Make sure you have query dates for the summer session, and not after!
  - Do your personnel dates and query dates reflect when the work is being done?
    - We cannot pre-pay anyone for work
    - We cannot wait to pay as “after-the-fact”, meaning, a long time after work has been completed. Pay requested for work completed 3 months earlier will not be approved because it is a compliance concern.
- **Am I aware of the current UNC General Administration (GA) Guidelines and their potential impact on this special pay?**
  - See AABP website: <https://provost.uncc.edu/academic-budget-personnel/useful-links>
  - Discuss \$/% calculations with your Business Officer to ensure the payment is allowed.



# Compliance Considerations:

## Questions to ask yourself

- **Is this a brand new instance of work for this employee?**
  - If this pay is for the continuation of work, then complete a PD-7 to change the length of the assignment rather than a new EPAF
    - Example: 9 mos stipend with continuation of work done in the summer.
- **Is this person being paid on a grant fund?**
  - Please ensure grants and contracts has been involved in the vetting of this payment.
  - Just because AA approves, does not mean that this payment will ultimately be approved by GCA who manages grant-specific compliance details.
- **Have you entered this payment with enough time for it to reasonably get through the approval queue?**
  - Please email your departmental approvers to let them know when you have entered an EPAF for their approval.
  - AA's ability to meet approval deadlines is based on when the EPAF hits the AA approval queue, NOT WHEN THE EPAF IS ENTERED INTO THE SYSTEM.

# How Do I Begin an EPAF?

EPAF Approver Summary  
EPAF Originator Summary  
New EPAF  
EPAF Proxy Records  
Act as a Proxy

1. Click **New EPAF** in the EPAF menu.

2. Enter UNCC ID.

3. Query Date must be the 1<sup>st</sup> or the 16<sup>th</sup>.

4. Choose Approval Category

5. Once Approval Category is chosen, all active jobs will appear

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

\* - indicates a required field.

ID: \*

Query Date: MM/DD/YYYY\*

Approval Category: \*



# Query Date & Approval Category

- **Query Date** – The first day of the pay period the employee will be paid.
  - Pay date = 15<sup>th</sup> of month → Query date = 1<sup>st</sup> day of month
  - Pay date = last day of month → Query date = 16<sup>th</sup> of month
- **Approval Category** – The type of EPAF you would like to complete.

# Completing an EPAF

Job Status will tell you if they have a current job.

Enter Position Number & Suffix

ID: Richard  
Query Date: Nov 16, 2017  
Approval Category: Special Pay fo

Create Assignment, JOBSAL

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job	<input type="text"/>	<input type="text"/>							<input type="radio"/>
	Primary	002268	00	Senior Lecturer	15215 Performing Arts Services (PAS)	Jul 01, 2009	Jun 30, 2022	Nov 15, 2017	Active	<input type="radio"/>

Click **Go** to continue

All Jobs

Next Approval Type

Go

- Click **All Jobs** to see the employee's past and current jobs.
- Enter the position number and the two digit suffix, then Tab.
  - Remember you can't use the same position number and suffix combination more than once.
- Click **Go** to continue.

# EPAF Details

<b>Name and ID:</b>		<b>Job and Suffix:</b> EPTF50-08, Part Time Lecturer
<b>Transaction:</b> 83002		<b>Query Date:</b> Sep 01, 2015
<b>Transaction Status:</b> Completed		<b>Last Paid Date:</b> Dec 31, 2015
<b>Approval Category:</b> Hire Part Time Faculty, E50PTF		
Next 🔄		
<a href="#">Approval Types</a>   <a href="#">Account Distribution</a>   <a href="#">Errors</a>   <a href="#">Routing Queue</a>   <a href="#">Comments</a>   <a href="#">Transaction History</a>		
<a href="#">EPAF Approver Summary</a>		
<a href="#">Return to EPAF Menu</a>		
Jump to Bottom		

- The top portion of the EPAF provides information entered on the previous screen

# EPAF Sections – Employee Information

- Enter the information requested for each field
- The “Employee Information” section sets the employee up on PEAEMPL in Banner

<i>Employee Information</i>		
<b>Enter Changes</b>	<b>Current Value</b>	<b>New Value</b>
Employee Class Code: *	50, EPA Temporary	50, EPA Temporary
Home COAS: *	1	1
Home Organization: *	18400, Language and Culture Studies	18400, Language and Culture Studies
Employee Status: *	Active	Active
Current Hire Date: *	08/24/2015	08/24/2015

- Fields may vary between different EPAFs.

# EPAF Sections – Create & End Assignment

- The “Create Assignment” and “Assignment End Date” sets up and terminates the job record on NBAJOBS in Banner

Create Assignment, ESPE45-11 EPA Staff Perm Special Payment		
Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		12/16/2017
Contract Type: *(Not Enterable)		S
Jobs Effective Date: MM/DD/YYYY*		12/16/2017
Personnel Date: MM/DD/YYYY*		12/10/2017
Title: *		Program Director
Job Status: *(Not Enterable)		A
Step: *(Not Enterable)		0
Annual Salary: *		5000
Factor: *		13
Pays: *		13
Timesheet Orgn: *		15200
Job Change Reason: *(Not Enterable)		E102
FTE: *		1.00

Assignment End Date, ESPE45-11 EPA Staff Perm Special Payment		
Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		06/30/2018
Personnel Date: MM/DD/YYYY*		06/30/2018
Job Status: *(Not Enterable)		T
Job Change Reason: *(Not Enterable)		E103

## Create Assignment, ESPE45-11 EPA Staff Perm Special Payment

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		12/16/2017
Contract Type: *(Not Enterable)		S
Jobs Effective Date: MM/DD/YYYY*		12/16/2017
Personnel Date: MM/DD/YYYY*		12/10/2017
Title: *		Program Director
Job Status: *(Not Enterable)		A
Step: *(Not Enterable)		0
Annual Salary: *		5000
Factor: *		13
Pays: *		13
Timesheet Orgn: *		15200
Job Change Reason: *(Not Enterable)		E102
FTE: *		1.00

These should be the same as the Query Date.

## Assignment End Date, ESPE45-11 EPA Staff Perm Special Payment

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		06/30/2018
Personnel Date: MM/DD/YYYY*		06/30/2018
Job Status: *(Not Enterable)		T
Job Change Reason: *(Not Enterable)		E103

## Create Assignment, ESPE45-11 EPA Staff Perm Special Payment

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		12/16/2017
Contract Type: *(Not Enterable)		S
Jobs Effective Date: MM/DD/YYYY*		12/16/2017
Personnel Date: MM/DD/YYYY*		12/10/2017
Title: *		Program Director
Job Status: *(Not Enterable)		A
Step: *(Not Enterable)		0
Annual Salary: *		5000
Factor: *		13
Pays: *		13
Timesheet Orgn: *		15200
Job Change Reason: *(Not Enterable)		E102
FTE: *		1.00

This is the date work begins.

Does this match the comment?

Do the Personnel Dates make sense for the Salary amount?

Is the salary amount appropriate for that length of time?

## Assignment End Date, ESPE45-11 EPA Staff Perm Special Payment

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		06/30/2018
Personnel Date: MM/DD/YYYY*		06/30/2018
Job Status: *(Not Enterable)		T
Job Change Reason: *(Not Enterable)		E103

## Create Assignment, ESPE45-11 EPA Staff Perm Special Payment

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		<input type="text" value="12/16/2017"/>
Contract Type: *(Not Enterable)		<input type="text" value="S"/>
Jobs Effective Date: MM/DD/YYYY*		<input type="text" value="12/16/2017"/>
Personnel Date: MM/DD/YYYY*		<input type="text" value="12/10/2017"/>
Title: *		<input type="text" value="Program Director"/>
Job Status: *(Not Enterable)		<input type="text" value="A"/>
Step: *(Not Enterable)		<input type="text" value="0"/>
Annual Salary: *		<input type="text" value="5000"/>
Factor: *		<input type="text" value="13"/>
Pays: *		<input type="text" value="13"/>
Timesheet Orgn: *		<input type="text" value="15200"/>
Job Change Reason: *(Not Enterable)		<input type="text" value="E102"/>
FTE: *		<input type="text" value="1.00"/>

Does the salary make sense for the Personnel Dates?

Needs to be comparable to an *internal benchmark* that shows a similar level of pay for similar work.

## Assignment End Date, ESPE45-11

Item	Current Value
Jobs Effective Date: MM/DD/YYYY*	
Personnel Date: MM/DD/YYYY*	
Job Status: *(Not Enterable)	
Job Change Reason: *(Not Enterable)	

If no internal benchmark, use the faculty member's hourly/weekly rate from their base salary to calculate.

# Tips & Guidance: Salary for Special Pay

## Internal Benchmark

- Provide a reference for how pay was determined.
- Is this something that has set rates of pay within your college?
- Assistance?:  
Department Chair or  
College Business  
Officer

## No Internal Benchmark

9-month salary = \$90,000



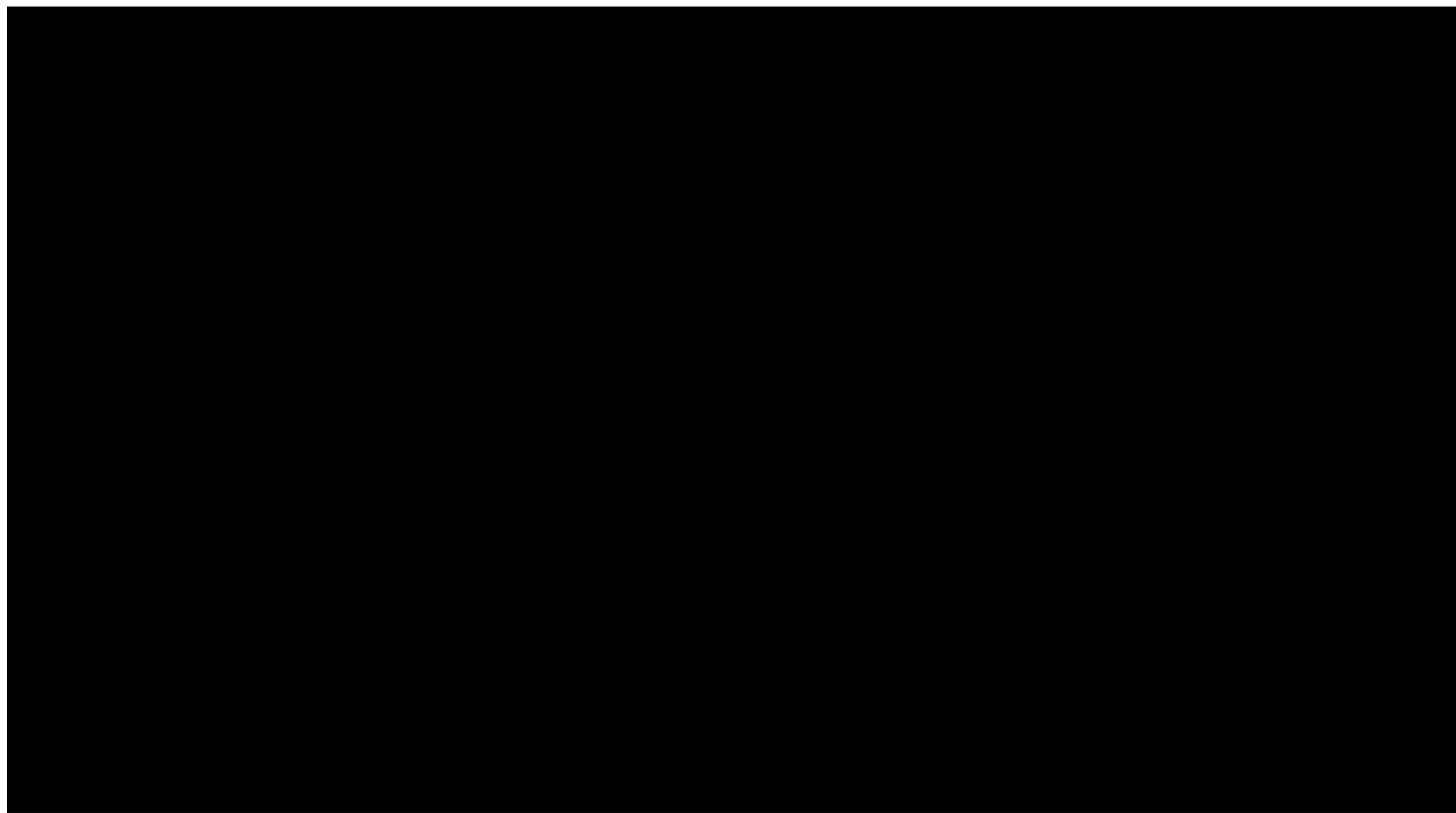
Weekly salary = \$2,500 (36 weeks)



Hourly rate = \$62.50 (40 hours per wk.)

**So special pay cannot exceed \$62.50 per hour or \$2,500 per week.**

# Tips & Guidance: Salary for Special Pay



## Create Assignment, ESPE45-11 EPA Staff Perm Special Payment

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		<input type="text" value="12/16/2017"/>
Contract Type: *(Not Enterable)		<input type="text" value="S"/>
Jobs Effective Date: MM/DD/YYYY*		<input type="text" value="12/16/2017"/>
Personnel Date: MM/DD/YYYY*		<input type="text" value="12/10/2017"/>
Title: *		<input type="text" value="Program Director"/>
Job Status: *(Not Enterable)		<input type="text" value="A"/>
Step: *(Not Enterable)		<input type="text" value="0"/>
Annual Salary: *		<input type="text" value="5000"/>
Factor: *		<input type="text" value="13"/>
Pays: *		<input type="text" value="13"/>
Timesheet Orgn: *		<input type="text" value="15200"/>
Job Change Reason: *(Not Enterable)		<input type="text" value="E102"/>
FTE: *		<input type="text" value="1.00"/>

Are these the correct number of pay periods for the Job Effective Dates?

## Assignment End Date, ESPE45-11 EPA Staff Perm Special Payment

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		<input type="text" value="06/30/2018"/>
Personnel Date: MM/DD/YYYY*		<input type="text" value="06/30/2018"/>
Job Status: *(Not Enterable)		<input type="text" value="T"/>
Job Change Reason: *(Not Enterable)		<input type="text" value="E103"/>

## Create Assignment, ESPE45-11 EPA Staff Perm Special Payment

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		<input type="text" value="12/16/2017"/>
Contract Type: *(Not Enterable)		<input type="text" value="S"/>
Jobs Effective Date: MM/DD/YYYY*		<input type="text" value="12/16/2017"/>
Personnel Date: MM/DD/YYYY*		<input type="text" value="12/10/2017"/>
Title: *		<input type="text" value="Program Director"/>
Job Status: *(Not Enterable)		<input type="text" value="A"/>
Step: *(Not Enterable)		<input type="text" value="0"/>
Annual Salary: *		<input type="text" value="5000"/>
Factor: *		<input type="text" value="13"/>
Pays: *		<input type="text" value="13"/>
Timesheet Orgn: *		<input type="text" value="15200"/>
Job Change Reason: *(Not Enterable)		<input type="text" value="E102"/>
FTE: *		<input type="text" value="1.00"/>

## Assignment End Date, ESPE45-11 EPA Staff Perm Special Payment

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		<input type="text" value="06/30/2018"/>
Personnel Date: MM/DD/YYYY*		<input type="text" value="06/30/2018"/>
Job Status: *(Not Enterable)		<input type="text" value="T"/>
Job Change Reason: *(Not Enterable)		<input type="text" value="E103"/>

Is this either the 15<sup>th</sup> or the last day of a month?

# Tips & Practice: Factors & Pays

- To compute factors & pays, consider how many pay periods will happen between the **query dates** you have listed.
- We have two pay periods a month, on the 15<sup>th</sup> and the end of the month.
- If you get them wrong, the system could end up paying the incorrect amount to the employee.

## How many factors & pays?

- **You enter a special pay with a query date of August 1st and a job effective date of May 15<sup>th</sup>.**
  - Answer: 19 pay factors
- **You enter a special pay with a query date of October 1<sup>st</sup> and a job effective date of December 31<sup>st</sup>.**
  - Answer: 6 pay factors

## Create Assignment, ESPE45-11 EPA Staff Perm Special Payment

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		12/16/2017
Contract Type: *(Not Enterable)		S
Jobs Effective Date: MM/DD/YYYY*		12/16/2017
Personnel Date: MM/DD/YYYY*		12/10/2017
Title: *		Program Director
Job Status: *(Not Enterable)		A
Step: *(Not Enterable)		0
Annual Salary: *		5000
Factor: *		13
Pays: *		13
Timesheet Orgn: *		15200
Job Change Reason: *(Not Enterable)		E102
FTE: *		1.00

## Assignment End Date, ESPE45-11 EPA Staff Perm Special Payment

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		06/30/2018
Personnel Date: MM/DD/YYYY*		06/30/2018
Job Status: *(Not Enterable)		T
Job Change Reason: *(Not Enterable)		E103

This is the date work ends.

Does it match the comment?

Do the Personnel Dates make sense for the Salary amount?

# EPAF Sections – Funding Source

Funding Source, EPTF50-03 EPA Temporary - Teaching

Current

Effective Date: 04/01/2015

COA Index Fund Organization Account Program Activity Location Project Cost Percent

New

Effective Date: MM/DD/YYYY 04/01/2015

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
1	117318	117318	24200	913200	17000					100.00		
										<b>Total:</b>	100.00	

## Errors and Warning Messages

Type	Message Type	Description
Funding Source	ERROR	Account code is required.

\* - indicates a required field.

Click **Default from Index** to change the values in the Fund and Organization columns

Should always equal 100

Default from Index

Save and Add New Rows

- The “Funding Source” populates NBAJOBS in Banner.
- If split funding enter each funding source on separate lines.
- Click **Default from Index** once the Index has been entered.

# Funding Source, Routing Queue, & Comment

New

Effective Date: MM/DD/YYYY

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
Q 1	Q			Q 911300	17000					100.00		
Q	Q			Q								
Q	Q			Q								
Q	Q			Q								
Q	Q			Q								



Is this number either 911300 (non-teaching) or 913300 (teaching an accredited course)?

## Routing Queue

Approval Level	User Name	Required Action
1 - (PAYROL) Payroll	Q RMURQUHA	FYI
45 - (DEPT) Department	Q	Approve
60 - (AA) Academic Affairs	Q EMOLL1 Elizabeth E Moll	Approve
65 - (FUND) Fund Approval	Q EMOLL1 Elizabeth E Moll	Approve
90 - (HR) Human Resources	Q BANWORX . Appworx	Apply
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected

## Comment

# EPAF Sections – Routing Queue

If you set up your Default Routing Queue the routing section will be complete.

Routing Queue

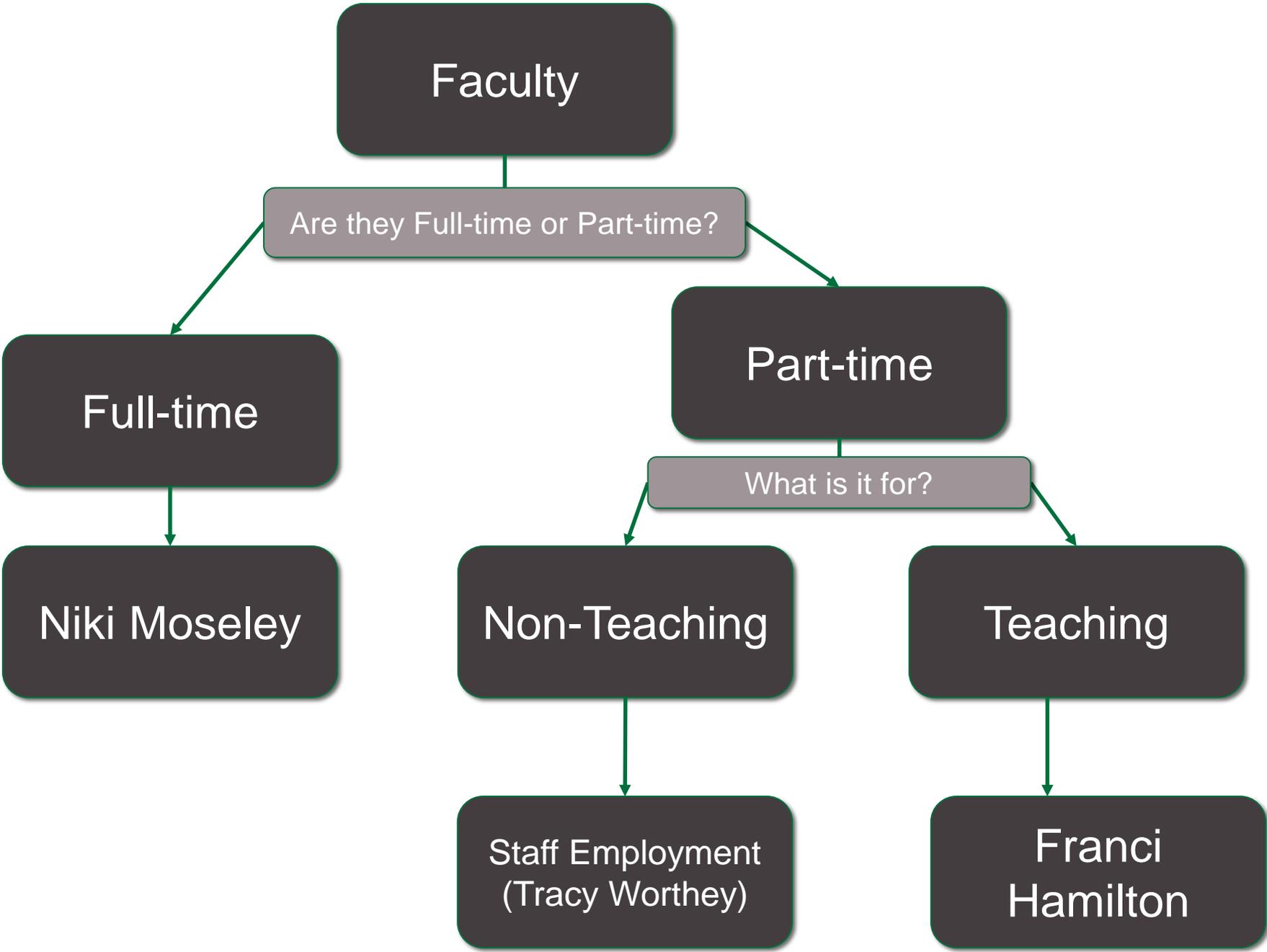
Approval Level	User Name	Required Action
1 - (PAYROL) Payroll	RMURQUHA Rebecca Mae Urquhart	FYI
45 - (DEPT) Department		Approve
60 - (AA) Academic Affairs	EMOLL1 Elizabeth E Moll	Approve
65 - (FUND) Fund Approval	EMOLL1 Elizabeth E Moll	Approve
90 - (HR) Human Resources	BANWORX . Appworx	Apply
Not Selected		Not Selected

Save and Add New Rows

Comment

Can add additional approvers if needed

- The Routing Queue determines the approval workflow.
- Click **Save and Add New Rows** once the approvers have been entered.



EHRA Non-Faculty

SHRA

What is it for?

Contact  
Tracy Worthey

Teaching

Non-  
Teaching

Niki Moseley

Contact Sarah Ekis  
before submitting an  
EPAF

Sarah Ekis



# Routing Queue Cont'd

New

Effective Date: MM/DD/YYYY

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
Q 1	Q			Q 911300	17000					100.00		
Q	Q			Q								
Q	Q			Q								
Q	Q			Q								
Q	Q			Q								

Total: 100.00



## Routing Queue

### Approval Level

- 
- 
- 
- 
- 
- 
- 
- 
- 

User	Required Action
Q RM	FYI
Q	Approve
Q EMOLL1 Elizabeth E Moll	Approve
Q EMOLL1 Elizabeth E Moll	Approve
Q BAN	Apply
Q	Not Selected

Is this SHRA teaching an accredited course?

Add Staff Employment: Tracy Worthey

## Comment

# Routing Queue Cont'd

New

Effective Date: MM/DD/YYYY

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
Q 1	Q			Q 911300	17000					100.00	
Q	Q			Q							
Q	Q			Q							
Q	Q			Q							
Q	Q			Q							
<b>Total:</b>										100.00	



## Routing Queue

### Approval Level

- 
- 
- 
- 
- 
- 
- 
- 
- 

### Comment

User Name	Required Action
Q RMUR0	<input type="text" value="FYI"/>
Q	<input type="text" value="Approve"/>
Q EMOLL	<input type="text" value="Approve"/>
Q EMOLL1   Elizabeth E Moll	<input type="text" value="Approve"/>
Q BA	<input type="text" value="Apply"/>
Q	<input type="text" value="Not Selected"/>

Is this EHRA staff teaching an accredited course?

Add Sarah Ekis as another AA Approver

# EPAF Sections - Comments

Comment

**Date:** Apr 07, 2015 03:40:36 PM  
**Made by:** Jessica Harper Miller, JCHARPER  
**Comments:** Teaching ENGL1101-03 for the Fall 2015 semester.

Transaction History

Action	Date	User Name
Created:	Apr 07, 2015	Jessica Harper Mill

Approval Types

Save Submit Delete

Once Comments are saved they appear in the Comments section.

Click **Save** once your comments have been entered.

Click **Submit** to route the EPAF for Approval

- Comments are always needed and are used to enter additional information and provide explanations for actions concerning the EPAF.
- Comments can be added at any time as the EPAF moves through the workflow.
- Click **Save** once the comments have been entered. Then **Submit** to route the EPAF for approval.

# Comment

New

Effective Date: MM/DD/YYYY

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
Q 1	Q			Q 911300	17000					100.00		
Q	Q			Q								
Q	Q			Q								
Q	Q			Q								
Q	Q			Q								
<b>Total:</b>										100.00		



## Routing Queue

Approval Level	User Name	Required Action
1 - (PAYROL) Payroll	Q RMURQUHA Rebecca Mae Urquhart	FYI
45 - (DEPT) Department	Q	Approve
60 - (AA) Academic Affairs	Q EMOLL1 Elizabeth E Moll	Approve
65 - (FUND) Fund Approval	Q EMOLL1 Elizabeth E Moll	Approve
90 - (HR) Human Resources	Q BANWORX . Appworx	Apply
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected

Does this include a detailed description of the work performed?

If SHRA, EHRA staff, or 12-Month Faculty, is Justification comment added?

## Comment

# Submitting the EPAF

Confirmation Message  
that EPAF submitted  
successfully

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

**Name and ID:** Courtney  800

**Transaction:** 78941 **Query Date:** Apr 01, 2015

**Transaction Status:** Pending

**Approval Category:** Hire Part Time Faculty, E50PTF

- Once the originator clicks Submit the EPAF has moved to the first Approver for Approval.
- If the EPAF is submitted successfully you will receive:
  - A confirmation message at the top of the screen
  - A “Transaction” number
  - “Transaction Status” will change to Pending.



# Submitting the EPAF

- If there are any data validity issues within the EPAF, Banner will display two types of messages:
  - **ERROR** - Error messages will not allow the EPAF to progress to the approval levels. Errors must be corrected. Read the details provided, and correct the errors as indicated.
  - **WARNING** - Warning messages simply deliver information, and allow the EPAF to progress successfully.

# What if I need help?

- Training Manuals for EPAFs:
  - Financial Services Website:  
<http://finance.uncc.edu/resources/training-materials/electronic-personnel-action-form>
    - EPAF General Instructions
    - Hire Adjunct / Part-time Faculty
    - Special Payments for Full Time Faculty & EHRA Staff
    - Hire Temporary EHRA Staff
  - Academic Budget & Personnel Website:  
<http://provost.uncc.edu/academic-budget-personnel/training>
    - Today's presentation
    - EPAF Cheat sheet
    - Camtasia video
- Coming soon- College and Unit Internal EPAF experts

# Let's return to our scenarios...

- *How would you complete EPAFs for your assigned scenario and what are the special considerations for that scenario?*
- **Scenario #1:** You have an EHRA Staff member who you would like to pay to teach a class in the Fall Semester.
- **Scenario #2:** You have a faculty member who needs to be paid partial summer salary for some work on a grant completed between May 16<sup>th</sup> and June 30<sup>th</sup>.
- **Scenario #3:** You have a faculty member that has earned a college level award. You would like it to be paid in the March 31<sup>st</sup> payroll.
- **Scenario #4:** You have a faculty member from another college who is completing a project for your department. Work will be done between July 1<sup>st</sup> and September 30<sup>th</sup>.

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QUESTIONS OR  
COMMENTS?

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# Important EPAF Contacts

Franci Hamilton	University Program Specialist, PT Faculty Hiring (AA)	<a href="mailto:frhamilt@uncc.edu">frhamilt@uncc.edu</a>	7-5776
Tracy Worthey	Staff Employment (HR)	<a href="mailto:taworthe@uncc.edu">taworthe@uncc.edu</a>	7-0670
Sarah Ekis	Human Resources Consultant, EPA NF Administration	<a href="mailto:sekis@uncc.edu">sekis@uncc.edu</a>	7-1433
Niki Moseley	Budget Manager (AA)	<a href="mailto:nsmosele@uncc.edu">nsmosele@uncc.edu</a>	7-5772
Elizabeth Moll	Business Officer (AA)	<a href="mailto:Elizabeth.Moll@uncc.edu">Elizabeth.Moll@uncc.edu</a>	7-5777

**THANK YOU!**

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