Quick Reference Guide to EPAFs

Creating an EPAF

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

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

2. Enter UNCC ID

3. Query Date must be the 1st or the 16th.

4. Choose Approval Category

5. Once Approval Category is chosen, click **Go**.

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

* - indicates a required field.

ID: * 800

Query Date: MM/DD/YYYY* 11/16/2017
Approval Category: * Special Payment for Full Time Employee, E45SP

Go

6. Click **All Jobs** to see the employee's past and current jobs.

7. Enter position number and two digit suffix, then tab.

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

9. Click **Go** to continue.

ID: Richard , 800
Query Date: Nov 16, 2017
Approval Category: Special Pay for Full Time Emp, E45SP

Create Assignment, JOBSAL

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									●
	Primary	002268	00	Senior Lecturer	15215, Performing Arts Services (PAS)	Jul 01, 2009	Jun 30, 2022	Nov 15, 2017	Active	○

All Jobs

Next Approval Type   Go

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10. Enter the information requested for each field

- The "Employee Information" section sets the employee up on PEAEMPL in Banner

Employee Information

Enter Changes	Current Value	New Value
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

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

11. Enter in information requested for each field

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

12. Enter in funding source information requested for each field

13. Click **Default from Index** once the Index has been entered.

- The "Funding Source" populates NBAJOBS in Banner.

- If split funding enter each funding source on separate lines.

New
Effective Date: MM/DD/YYYY 11/16/2017

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1	141007	141007	90000	911300	17000					100.00	
										Total: 100.00	

✓

[Default from Index] [Save and Add New Rows]

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14. Enter in the appropriate approvers into the Routing Queue

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

15. Click **Save and Add New Rows** once the approvers have been entered.

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 ▾
Not Selected ▾	🔍			Not Selected ▾
Not Selected ▾	🔍			Not Selected ▾
Not Selected ▾	🔍			Not Selected ▾

[Save and Add New Rows]

Comment

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 Miller

Approval Types | Acco...

[Save] [Submit] [Delete]

16. Click **Save** once the comments have been entered.

- 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.

17. Click **Submit** to route the EPAF for approval.

- A confirmation message at the top of the screen
- A "Transaction" number
- "Transaction Status" will change to Pending.

✔ 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