

EPAF Cheat Sheet: Staff Assignments

Definition of Staff Assignments (–ASN): This Cheat Sheet applies *only* to **staff employees who have been previously employed by the University**; if the employee has not worked for USF in the past, please refer to the Cheat Sheet for “Staff New Hires.”

Purpose: EPAFs set up employees in the Payroll database and authorize payment; ***a paid employee cannot work at USF without an EPAF submission.*** For EPAF tutorials, please see:

<http://www.usfca.edu/hr/banner/epaf>

Timing: Generally, EPAF’s are due about two weeks before the end of a pay period. The 2009 submission schedule can be found at: http://www.usfca.edu/hr/banner/2009_payroll_schedule.pdf

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Required Steps/Actions	Completed [✓]
1. Go to Employee tab of USF Connect, select EPAFs , then select New EPAF and enter employee’s CWID .	
2. Determine employee assignment start date and enter this start date in the Query Date field.	
3. From the Approval Category menu, select the “Staff Assignments” category corresponding to the employee’s designated payroll (e.g. for employees on the semi-monthly payroll, select “SM Staff Assignments”) and click “ Go .” To determine the employee’s designated payroll, review the Employee Class list at: http://www.usfca.edu/hr/banner/pdf/employee_classes.pdf	
4. Determine position number and enter in Position field. Consult your department’s budget manager for assistance in determining your employee’s position number.	
5. To ensure that you are using the correct approval category click on All Jobs . If there are <i>any</i> assignments listed, then you are assured that this employee has previously held assignments with USF and it is correct to use the “Staff Assignments” approval category. If no assignments are listed, then exit this EPAF and reference the Cheat Sheet for <i>Staff New Hires</i> .	
6. If this is a full-time assignment, enter a suffix of “00.” If this is a part-time or stipend assignment, click on Active Jobs and reference the assignments listed under Number and Title to determine the suffixes currently in use. Enter the next available suffix number in the Suffix field, beginning with “00.” Click “ Create .”	
7. If there is a date listed in the Current Value column next to Job Begin Date , then re-enter the date listed into the New Value column. If there is no date listed in the Current Value column, then enter the assignment start date (i.e. Query Date) into the Job Begin Date field.	
8. Enter Contract Type , selecting “Overload” if this employee currently has other active assignments; or “Primary” if this is currently the employee’s sole assignment with USF.	
9. Leave the Contract Begin Date , Contract End Date , Factor and Pays fields blank, unless this is a stipend assignment. For stipend assignments, enter the first day of the assignment’s first pay period in the Contract Begin Date field and the last day of the assignment’s final pay period in the Contract End Date field. The Factor and Pays should both equal the number of stipend payments to be made on this assignment (i.e. the number of pay periods).	

10. If your employee is paid hourly, enter his/her hourly rate in the **Regular Rate** field and leave the **Salary** fields blank. If paid by salary, enter the employee's **Annual Salary** and leave the **Regular Rate** and **Assign Salary** fields blank.

11. Enter employee's **Title**.

12. Enter assignment **FTE**.

13. Enter Time Sheet Org (P-Org) [Value: _____]; to determine correct value, please see: http://www.usfca.edu/hr/banner/ts_orgn.html. This is an alpha/numeric code (P, followed by 5 digits) specifying the employee's E-Timesheet supervisor

14. Select "ADJOB – Add a New Assignment" from the **Job Change Reason** menu.

15. Confirm FOAP [Value: _____] in the "Fund," "Organization," "Account" and "Program" fields and make any needed changes (note: the FOAP comes from the department's budget Manager and designates the account from which the employee's pay is deducted).

16. Enter designated EPAF approvers in the **Routing Queue** section, as follows:

Approval Level	User Name	Approver Checks for:
20 – DEPMGR 30 - DIVAPR	(determined by dept.)	<ul style="list-style-type: none"> • Is hire approved? • Is hourly rate correct? • Is FOAP correct? • Is Timesheet Orgn value correct?
40 – HRSAPR	GFCANNELLA	<ul style="list-style-type: none"> • Is salary/rate within given range for e-class and job title?
60 – EPAFAP	MDHOLMES	<ul style="list-style-type: none"> • Are dates correct? • Do all fields contain values that are valid?
90 – PAYROL	TAKAHASHI	
99 – FINPAY	TAKAHASHI	<ul style="list-style-type: none"> • EPAF is applied to the system at this level.

17. Enter relevant **Comments** including assignment start date and employee's supervisor.

18. Click **Save** and then **Submit**.

19. Review and correct any errors you may receive. For assistance, please review Troubleshooting Guide at:

http://www.usfca.edu/hr/banner/epaf_guides/EPAF%20Troubleshooting%20Guide.pdf

20. Once the EPAF has been successfully submitted, monitor your e-mail for confirmation that your EPAF has been "Completed Successfully." If you receive an e-mail notification that the EPAF has been "Returned for Correction," revisit the EPAF in your **EPAF Originator Summary**, make the correction(s) specified in the **Comments** section, then **Save** and resubmit.

- **Once the EPAF is approved, the E-Timesheet is accessible to your new employee.**