

EPAF Cheat Sheet: Staff New Hire


Definition of Staff New Hire (–NW1): This Cheat Sheet applies *only* to **staff employees who have not been previously employed by the University**; if the employee has worked for USF in the past, please refer to the Cheat Sheet for “Staff Assignments.”

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

Contact Information for EPAF Support: Mike Holmes, 422-2430, epaf@usfca.edu

Required Steps/Actions	Completed [✓]
1. Prior to beginning the EPAF, ensure that the new employee has completed and returned the following forms to HR: <ul style="list-style-type: none"> • Employee Data Worksheet • W-4 • DE-4 • I-9, Employment Eligibility Verification • Signed job offer letter (at least 7 days prior to start date) 	
2. Go to Employee tab of USF Connect, select EPAFs , then select New EPAF and enter employee’s CWID . If a CWID has not yet been created for this employee, click the  icon to generate a CWID .	
3. Determine employee assignment start date and enter this start date in the Query Date field.	
4. From the Approval Category menu, select the “Staff New Hire” category corresponding to the employee’s designated payroll (e.g. for employees on the semi-monthly payroll, select “SM Staff New Hire”) 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	
5. Determine position number and enter in Position field. Consult your department’s budget manager for assistance in determining your employee’s position number.	
6. To ensure that you are using the correct approval category click on All Jobs . If there are <i>any</i> assignments listed, then exit this EPAF and reference the Cheat Sheet for <i>Staff Assignments</i> . If no assignments are listed, then continue to Step 7.	
7. 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.”	
8. Enter employee’s name and demographic information, copying verbatim the information provided in the Current Value column to the open fields in the New Value column.	
9. In the Employee Class Code field, enter the employee’s “E-Class.”	
10. Determine Distribution Org [Value: _____] and enter this value in <i>both</i> the Home Organization and Distribution Orgn fields. Please see: http://www.usfca.edu/hr/banner/check_distr_orgs.pdf . This is an alpha/numeric code assigned to the department (P, followed by 4 digits); it aids Payroll in the bundling and distribution of the department’s paychecks.	

11. 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

12. 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 in the **Contract Begin Date** field and the last day of the assignment in the **Contract End Date** field (note that for stipends the **Begin Date** must be the first day and the **End Date** the last day of a pay period, respectively). 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).

13. 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.

14. Enter assignment **FTE** and **Appointment Percent**.

15. Enter employee's **Title**.

16. 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).

17. 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.

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

19. Click **Save** and then **Submit**.

20. 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

21. 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.**