



UNIVERSITY *of*
SAN FRANCISCO

Guide *to* EPAFs *with* Banner HR

Supplemental Guide *for*
Student EPAFs

Published *by*
Department *of*
Human Resources

Version 1.1
August 2008

© USF Human Resources

Acknowledgements

The Department of Human Resources gratefully acknowledges many individuals for their contributions to the design of EPAF.

Patrice Auyong

Information Technology

Lori Bauwens

Information Technology

Sarah Blackburn

University Advancement

Ed Chow

Information Technology

Frank Deery

Human Resources

Elizabeth Forest

Information Technology

Angela Hon

College of Professional Studies

Rebecca Peters

Information Technology

John Pinelli

Arts & Sciences

Margaret Roberts

College of Professional Studies

Andrew Thompson

University Life

Ramona Valencia

School of Education

Helen Wong

College of Professional Studies

Linda Wong Lee

Academic Affairs

Banner EPAF was designed and managed by **Melissa Takahashi-Brooks** with the support of **Mike Holmes, Wanda Hicks, Millie Verde, Val Armstrong, George Chin, Martha Peugh-Wade, Maye-Lynn Gon-Soneda**, and the rest of the Human Resources staff.

A special thanks and appreciation goes out to **Denise Campbell** in Human Resources for designing and delivering the EPAF training program and documentation. We are grateful for **John Bansavich** in Information Technology for facilitating the Student EPAF training program.

Table of Contents

Introduction

- EPAF Defined
- EPAF Access
- EAPF Support: How to Get Help

Part I: EPAFs for Student Assignments

- 7 Steps to Create an Student EPAF

Part II: EPAF Originator Summary

- Current Tab
- History Tab

Part III: Approving EPAFs

- Approving, Acknowledging, and Returning EPAFs

Appendix:

- A: Student EPAFs
- B: Approving EPAFs
 - EPAF Approver Summary
 - Approving, Acknowledging, and Returning an EPAF
 - Designate a Proxy Approver
 - Act as a Proxy Approver
- C: EPAF reference
 - Banner E-Classes
 - Job Change Reasons
 - EPAF Originator Summary
 - Set up a Default Routing Queue
 - EPAF Security Application

Introduction

EPAF Defined

An **E**lectronic **P**ersonnel **A**ction **F**orm, called **EPAF**, is an online form originated by the department to communicate an employment decision about an employee to the Payroll Department. All employment decisions require the attention of Human Resources, and require the employees' Human Resources Information System (HRIS) file to be updated. So, the department is required to fill out a form that specifies the nature and details of the employment decision.

Common examples of employment decisions requiring an EPAF include:

- ✓ Hire a new employee
- ✓ Transfer an employee from one department to another
- ✓ Give an employee a pay or merit increase
- ✓ Change the labor distribution of the employee's job
- ✓ Add an assignment to the employee's job records

There are many more **Job Change Reasons**. Refer to a complete list in the Appendix of this guide.

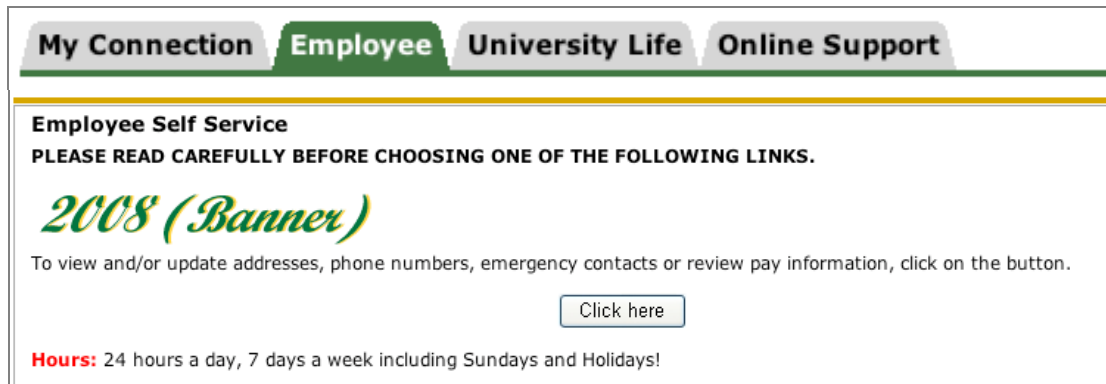
Each job change must be approved on multiple levels. All EPAFs require department and division approval. Each EPAF is assigned an "Approval Category" that determines the required levels of approval. Finally, the EPAF is approved by the Payroll Department, and the EPAF is applied to the employee's job record. If there are any problems with the EPAF, a designated Approver can select **Return for Correction** and require the originator to correct or recreate the EPAF.

The EPAF must be completed, approved, and applied in a timely manner so the employees' job record can be updated. Timely completion of an EPAF is essential to help the Payroll Department pay an employee accurately and on time. For a complete EPAF Submission Schedule, log onto usfca.edu/hr/banner.

EPAF Access

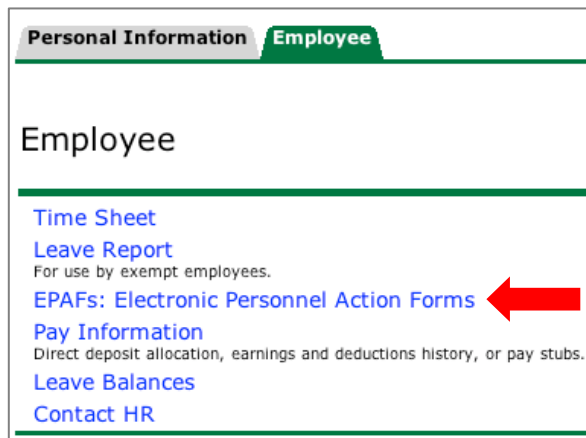
In order to access, create, or originate EPAFs, a user must complete and return an **EPAF Security Application** (see Appendix). Once the application is processed and approved, the user can follow these steps to access EPAF:

Log into **USF Connect**, select the **Employee Tab**, and **click here** on Banner.



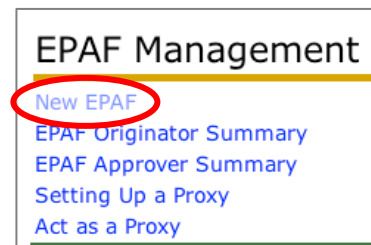
The screenshot shows the 'Employee Self Service' section of the USF Connect interface. At the top, there are four tabs: 'My Connection', 'Employee' (which is highlighted in green), 'University Life', and 'Online Support'. Below the tabs, the text reads 'Employee Self Service' followed by 'PLEASE READ CAREFULLY BEFORE CHOOSING ONE OF THE FOLLOWING LINKS.' A large green link labeled '2008 (Banner)' is prominently displayed. Below this link, a smaller text line says 'To view and/or update addresses, phone numbers, emergency contacts or review pay information, click on the button.' A 'Click here' button is positioned below the text. At the bottom left, the hours of service are listed as 'Hours: 24 hours a day, 7 days a week including Sundays and Holidays!'.

Select **EPAF: Electronic Personnel Action Form**



The screenshot shows the 'Employee' tab selected in the USF Connect interface. The 'Employee' title is at the top. Below it, a list of links is provided: 'Time Sheet', 'Leave Report' (with a sub-note 'For use by exempt employees.'), 'EPAFs: Electronic Personnel Action Forms' (highlighted with a red arrow), 'Pay Information' (with a sub-note 'Direct deposit allocation, earnings and deductions history, or pay stubs.'), 'Leave Balances', and 'Contact HR'.

Select **New EPAF**



The screenshot shows the 'EPAF Management' menu. The 'New EPAF' option is circled in red. Other options listed include 'EPAF Originator Summary', 'EPAF Approver Summary', 'Setting Up a Proxy', and 'Act as a Proxy'.

After accessing EPAF, follow the 7 Steps to Creating an EPAF for Student, Faculty, and / or Staff Assignments in the two chapters that follow.

EPAF Support – How to Get Help

For more information about EPAF, log onto usfca.edu/hr/hanner/epaf. Also, contact EPAF@usfca.edu or (415) 422-5743.

I. Student Assignments:

Steps to Create an EPAF

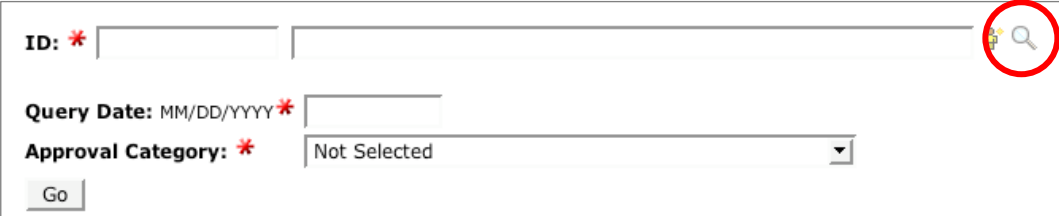
The following pages describe the seven steps required to originate and submit an EPAF for a Student Assignment:

- Step 1: New EPAF Person Selection
- Step 2: Job Selection
- Step 3: Main Job Information
- Step 4: Labor Distribution / FOAP
- Step 5: Approval Routing Queue
- Step 6: Comments
- Step 7: Save & Submit

Step 1 and 2 are the foundations of the EPAF. All of the other steps can be modified during the EPAF creation process or after an EPAF has been returned for correction – except Steps 1 and 2. So, it's important to be accurate.

Step 1: New EPAF Person Selection

Image 1.1



The screenshot shows a search form with the following fields: "ID: *" with an empty text box; "Query Date: MM/DD/YYYY *" with an empty text box; and "Approval Category: *" with a dropdown menu showing "Not Selected". A "Go" button is located at the bottom left. A magnifying glass icon in the top right corner is circled in red.

1.1 ID

Begin by searching for the employee for whom the EPAF is being created. If the person is already an employee of the University, simply type his or her CWID# into the ID field. (see Image 1.1) If it is not known if the person is an employee, then search the employee data base.

Image 1.2



The screenshot shows a "Search Criteria" form with the following fields: "Employee:" with a circled checkbox; "Last Name:" with an empty text box; "First Name:" with an empty text box; "ID:" with an empty text box; and "SSN/SIN/TIN:" with an empty text box. There are "Or" labels between the "Last Name" and "First Name" fields, and between the "ID" and "SSN/SIN/TIN" fields.

To search the employee data base, click on the magnifying glass icon, check the "Employee" box, and enter identifying information about the person. (see Image 1.2) If the person is set up as an employee, the search will return results. If the person is not defined as an employee, complete an EPAF with a **New Hire** approval category. (see 1.3 Approval Category below)

1.2 Query Date

Next, input the Query Date. Determine the Query Date by following general guidelines:

If this EPAF terminates an assignment, use the last day of a pay period.

If this EPAF creates a new assignment for a new-hire or re-hire, use the start date of employment. For all other EPAFs, use the first day of the pay period in which the Payroll Department is accepting EPAFs. Consult the EPAF Submission Schedule at usfca.edu/hr/banner/epaf.

IMPORTANT: Even if the EPAF is for a job or change that is effective in the past, use a **Query Date** that is within the current pay period in which the Payroll Department is accepting EPAFs. A Query Date in a future pay period may also be used. However, do NOT use a Query Date that is within a PAST pay period.

1.3 Approval Category

There are several general types of EPAFs. The body of the EPAF populates based upon the selected Approval Category. The Approval Category also determines which levels are required for EPAF approval. Select the Approval Category that most appropriately fits the type of EPAF that is being created:

STUNW1 – New Hire

Select this approval category to populate more fields to provide basic employment information. Use this type of EPAF only if the person is not defined as an employee in Banner. (see *ID* above)

STUTRM – Termination of Assignment

Select this approval category to terminate an employee's assignment. TIP: Be sure to use the end date of a pay period as the Query Date (see *Query Date* above)

STUASN – New Assignment

Select this approval category to create a new assignment for an employee.

STUADJ – Adjustment

Select this approval category to modify an assignment (i.e., salary, FOAP, or title change) with a retroactive date.

TIP: Be sure to still use the start date of the current pay period in which the Payroll Department is accepting EPAFs. The true effective date of the job change is reflected in Step 3.

STUSAL – Salary

Select this approval category to change only the salary of an existing job.

STULBR – Labor Distribution

Select this approval category to change only the FOAP or labor distribution of an existing job.

STUEND – Termination of Employment

Do not select this approval category. This will be phased out of the EPAF system for student assignments.

Step 3: Main Job Information

Step 3 offers many fields for data entry depending on the Approval Category selected in Step 1. Please see the Appendix of this guide for specific reference for many common types of EPAFs:

- Student Position, Account, and Suffix Numbers
- Student New Hires
- Student Assignments
- Student Retro Salary Adjustment
- Student Assignment Termination
- Student Salary Increase

Step 4: Labor Distribution / FOAP

Step 4 determines how the labor for this position will be charged within Business & Finance. The **FOAP** is a four-part numeric sequence that includes a **Fund**, **Organization**, **Account**, and **Program** number.

Image 1.5

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
S	950020	521001	680010	9500					100.00
Total:									100.00

All student assignment and new hire EPAFs populate a generic FOAP, and it must be changed by the EPAF originator. Input the designated **Fund**, **Organization**, **Account**, and **Program** specific to the department to charge the job’s labor cost.

The department or division budget manager can provide the EPAF originator with the Fund, Organization, and Program for labor distribution. Use these account numbers for each type of assignment:

<u>Job Type</u>	<u>Acct #</u>
Off Campus Work Study	B49999
Regular Non-Work Study	B59999
Campus Job Opportunity	B69999
On Campus Work Study	B79999
America Reads	B89999
Stipend	C99999

TIP: The Account number automatically populates with correlation to the position number entered in Step 2. So it rarely needs to be retyped.

IMPORTANT: Work Study assignments are charged with a labor distribution split: 30% to the department, 70% to a Federal Work Study grant. When retyping the FOAP, only retype the 30% FOAP – leave the 70% FOAP as it is populated. See example below.

Image 1.6

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	P
\$	110000	622908	681000	1900					
\$	410101	339010	681010	1800					

Step 5: Routing Queue

Step 5 determines the individuals who approve the EPAF.

Image 1.7

Approval Level	User Name	Required Action
20 - (DEPMGR) Manager/ Department Head		Approve
40 - (SEMPY) Student Employment	PRADO	Approve
90 - (PAYROL) Payroll	CONCEPCION	Approve
99 - (FINPAY) Final Applier	CONCEPCION	Apply
Not Selected		Not Selected

Each required **Approval Level** populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual **User Name** for each level:

20 – (DEPMGR) Manager/Department Head:

Using the magnifying glass search icon, select the most appropriate Approver from the available users.

40 – (SEMPY) Student Employment:

Always select **PRADO, Norma Prado.**

90 – (PAYROL) Payroll:

Always select **CONCEPCION, Reuben Concepcion.**

99 – (FINPAY) Final Applier:

Always select **CONCEPCION, Reuben Concepcion.**

There are three possible **Required Actions**:

- Approve** The individual is required to “approve” the EPAF. The EPAF can not be approved at a higher level until is it is approved at lower levels.
- Apply** Only an individual at the payroll level can “apply” an EPAF. This is the action that occurs when an EPAF turns into a jobs record in the payroll system. Always select the same individual who approves an EPAF at the *Payroll Level (90)* to *Apply (99)* the EPAF.

FYI

An EPAF originator can select additional individuals at different levels to “FYI” or “acknowledge” the EPAF. Unlike the required action to “approve,” an EPAF can be approved and applied at higher levels if the EPAF Approver doesn’t perform the required action of “FYI.”

TIP: If someone would like to have viewing access to the EPAF, indicate their name as an FYI. Only registered EPAF users can receive an FYI of an EPAF.

If the position is paid out of a grant account (**Fund** begins with the number “4”), FYI an Approver at the *Grants Level (50)*. See example below.

Image 1.8

Routing Queue			
Approval Level	User Name		Required Action
20 - (DEPMGR) Manager/ Department Head	Q		Approve
40 - (SEMPY) Student Employment	Q	PRADO	Norma P Prado Approve
90 - (PAYROL) Payroll	Q	CONCEPCION	Reuben Madrid Concepcion Approve
99 - (FINPAY) Final Applier	Q	CONCEPCION	Reuben Madrid Concepcion Apply
50 - (GRANTS) Grants	Q	SECROWHURST	Stacey E Crowhurst FYI
Not Selected	Q		Not Selected

Step 6: Comments

Indicate E-timesheet supervisor and **Timesheet Organization number** (also referred to as P-Org / Payroll Organization) in the comments.

Image 1.9

Comment
Job is RA position assisting Proffessor D. Duck. E-timesheet supervisor is M. Mouse #P10010.

Include any other pertinent details about the EPAF in the comments.

For example:

Arts & Sciences positions:

Indicate type of position
(i.e., RA or TA position)

Retro/Adjustment EPAFs:

Indicate reason for late EPAF and
any back pay owed to student.

IMPORTANT: Once comments are “saved,” they can not be changed. Be careful with articulating comments. An EPAF user can make multiple comments to the EPAF. And comments can be attached to the EPAF at any approval level.

Step 7: Save & Submit

To complete the EPAF, click **Save** then **Submit**. 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. Usually, warning messages inform the originator, approvers, and payroll department about budget issues associated with the job.

When an EPAF is **Successfully Applied**, the originator will receive a confirmation e-mail. If an EPAF is **Returned for Correction**, the originator will receive an alert e-mail. The originator must log into the **EPAF Originator Summary** to view, void, update, or re-submit the EPAF.

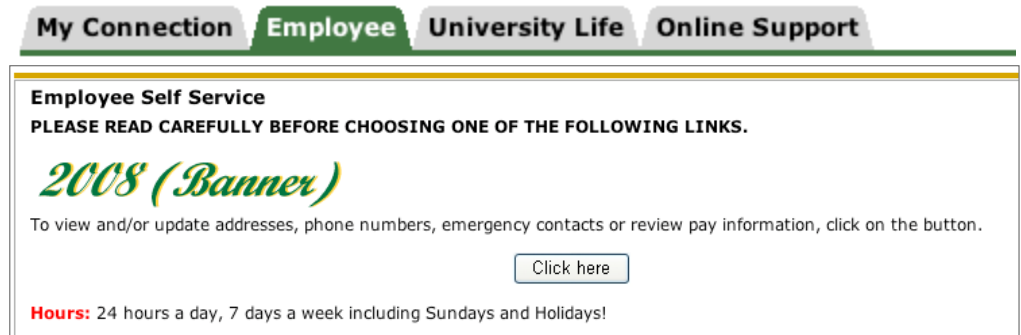
II. EPAF Originator Summary

The EPAF Originator Summary stores EPAFs that the Originator has created, voided, saved, or submitted. It also contains EPAFs that have been **Returned for Correction** and require the Originator's attention.

To access the EPAF Originator Summary,

Log into **USF Connect**, select the **Employee Tab**, and **click here** on Banner.

Image 2.1



Select **EPAF: Electronic Personnel Action Form**

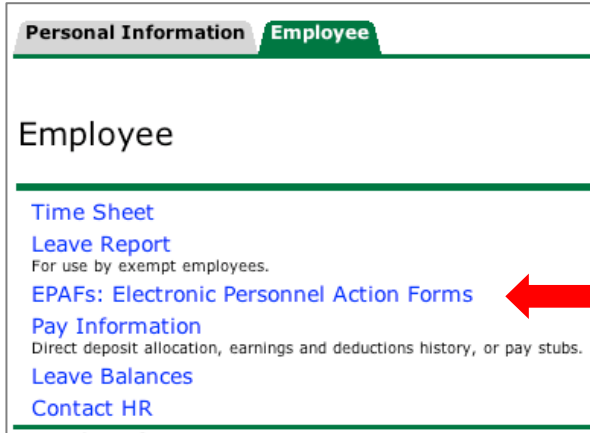


Image 2.2

Select **EPAF Originator Summary**

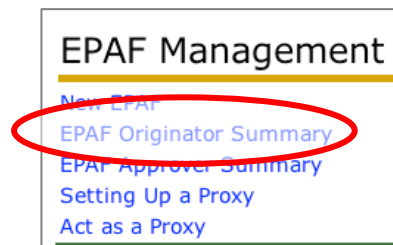


Image 2.3

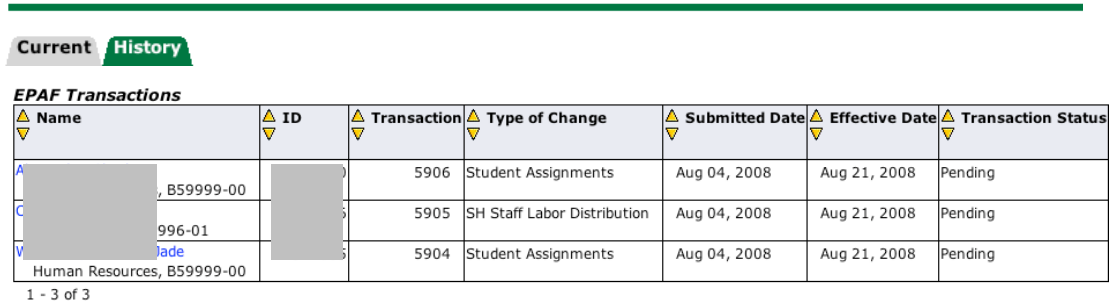
Within the EPAF Originator Summary, there are two tabs: **Current** and **History**.



History Tab

All EPAFs created by the Originator are stored in the History tab. To check the status of an EPAF, in the EPAF Originator Summary, click the History tab, and notice the Transaction Status of the EPAF.

Image 2.6



The screenshot shows a web interface with two tabs: 'Current' and 'History'. The 'History' tab is active. Below the tabs is a table titled 'EPAF Transactions'. The table has seven columns: Name, ID, Transaction, Type of Change, Submitted Date, Effective Date, and Transaction Status. There are three rows of data. The first row shows a transaction with ID 5906, Type of Change 'Student Assignments', Submitted Date 'Aug 04, 2008', Effective Date 'Aug 21, 2008', and Transaction Status 'Pending'. The second row shows a transaction with ID 5905, Type of Change 'SH Staff Labor Distribution', Submitted Date 'Aug 04, 2008', Effective Date 'Aug 21, 2008', and Transaction Status 'Pending'. The third row shows a transaction with ID 5904, Type of Change 'Student Assignments', Submitted Date 'Aug 04, 2008', Effective Date 'Aug 21, 2008', and Transaction Status 'Pending'. The Name column contains redacted information, but the third row includes the text 'Human Resources, B59999-00'. Below the table, it says '1 - 3 of 3'.

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status
[Redacted], B59999-00	[Redacted]	5906	Student Assignments	Aug 04, 2008	Aug 21, 2008	Pending
[Redacted] 996-01	[Redacted]	5905	SH Staff Labor Distribution	Aug 04, 2008	Aug 21, 2008	Pending
[Redacted] Jade Human Resources, B59999-00	[Redacted]	5904	Student Assignments	Aug 04, 2008	Aug 21, 2008	Pending

1 - 3 of 3

Possible transaction statuses include:

Pending

The EPAF is pending approval.

Complete

The EPAF has been completed and applied to the employee's job file.

Returned

The EPAF has been returned for correction.

Voided

The EPAF has been voided but its history remains available.

Overridden

The EPAF has been overridden and approved by a Super User at the Payroll level.

Removed from Queue

The EPAF has been returned to the Originator for correction thus is removed from the Approval Queue.

IMPORTANT: The Originator can only modify an EPAF if it has not been viewed or approved at a higher level in the approval queue. Click on the EPAF, and if the option Return for Correction exists, then the Originator may return it to him or herself, make a change, then resubmit.

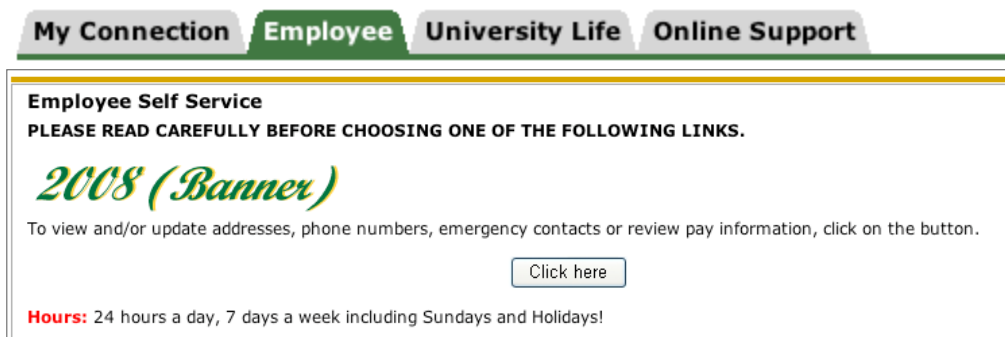
III: Approving EPAFS

The **EPAF Approver Summary** contains EPAFs that have the Approver listed in the Approval Queue.

To access the EPAF Approver Summary,

Log into **USF Connect**, select the **Employee Tab**, and **click here** on Banner.

Image 3.1



Select EPAF: Electronic Personnel Action Form

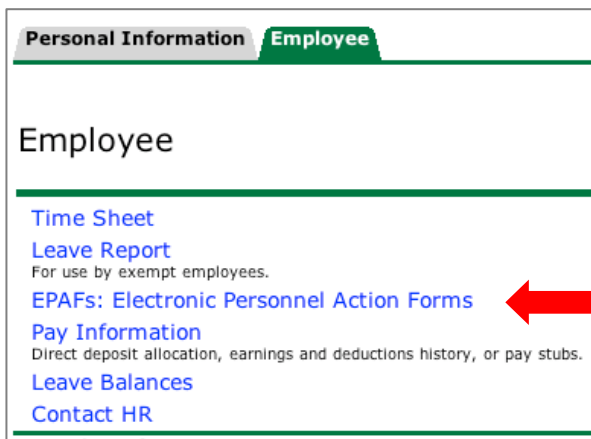


Image 3.2

Select EPAF Approver Summary

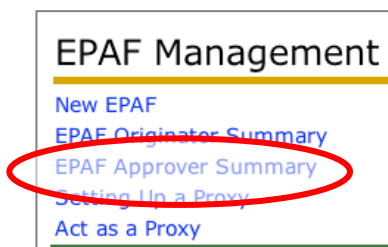


Image 3.3

Within the EPAF Originator Summary, there are three tabs: **Current**, **In My Queue**, and **History**.

Approving, Acknowledging, or Returning EPAFs

1. Current Tab

The **Current** tab is similar to an "inbox" for the EPAF Approver Summary. EPAFs that require the Approver's attention appear here. (see Image 3.4)

Image 3.4

Current In My Queue History

Filtering On
Queue Status: All Pending Go

Select All Reset Save

1 - 5 of 5

[New EPAF](#) | [Update Proxies](#) | [Search](#) | [Proxy or Superuser or Filter Transactions](#)

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Ge	B59999-02	1 6	5890 Student Assignments	Aug 01, 2008	Jul 21, 2008	Approve	<input type="checkbox"/>	**Comments
Ok	B59999-02	1 5	5878 Student Assignments	Aug 01, 2008	Jul 21, 2008	Approve	<input type="checkbox"/>	**Comments
Pc	999-66	1 6	5908 Student Termination of Employment	Aug 03, 2008	Jul 21, 2008	Approve	<input type="checkbox"/>	**Comments
Rc	C99999-00	1 8	5887 Student Assignments	Aug 01, 2008	Jul 21, 2008	Approve	<input type="checkbox"/>	**Comments
Ta	YT,	1 8	5884 Student Adjustments	Aug 01, 2008	Jul 21, 2008	Approve	<input type="checkbox"/>	**Comments

1 - 5 of 5

An EPAF can be approved by two ways. First, check the "Action" box next to each EPAF to be approved. Then, click **Save**. (see Image 3.4)

To view an EPAF, click on the employee's name. Review the EPAF. The Approver has two options: (see Image 3.5)

Approve

Click Approve to approve the EPAF and allow it to progress to the next approval level in the routing queue.

Return for Correction

Click this button to return the EPAF to the Originator for correction.

IMPORTANT: Approvers who return EPAFs should **Add Comment** to the EPAF indicating the reason for return.

Image 3.5

EPAF Preview

You are acting as an Approver.

Name and ID: [Redacted] **Job and Suffix:** B59999-02, Student Hourly Special
Transaction: 5890 **Query Date:** Jul 21, 2008
Transaction Status: Pending **Last Paid Date:**
Approval Category: Student Assignments, STUASG

Next 🗨️

Approve Return for Correction Add Comment

If the Required Action of an EPAF is **Acknowledge** or **FYI**, the Approver only has one option. However, the Approver can add a comment to the EPAF.

2. In My Queue Tab

The **In My Queue** tab shows EPAFs that are pending in the queue of the Approver. However, these EPAFs may not have been approved yet at a lower level. Or the EPAFs may be 'voided.'

3. History Tab

The **History** tab shows EPAFs that have been approved or acknowledged by the Approver.

TIP: Click on **Search** to find EPAFs by CWID, Employee Name, EPAF Transaction Number, and more. The search function will search the Current, In My Queue, and History tabs. (see Image 4.3)

Image 3.6

Filtering On

Queue Status: All Pending

[New EPAF](#) | [Update Profiles](#) | [Search](#) | [Proxy](#) or Superuser or Filter Transactions

Select All

1 - 5 of 5

EPAF Transactions										
Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links		
Gal...	B59999-02	1 6	5890	Student Assignments	Aug 01, 2008	Jul 21, 2008	Approve	<input type="checkbox"/>	**Comments	
Oc...	B59999-02	1 5	5878	Student Assignments	Aug 01, 2008	Jul 21, 2008	Approve	<input type="checkbox"/>	**Comments	
Por...	999-66	1 6	5908	Student Termination of Employment	Aug 03, 2008	Jul 21, 2008	Approve	<input type="checkbox"/>	**Comments	
Ro...	999999-00	1 8	5887	Student Assignments	Aug 01, 2008	Jul 21, 2008	Approve	<input type="checkbox"/>	**Comments	
Tar...	T,	1 8	5884	Student Adjustments	Aug 01, 2008	Jul 21, 2008	Approve	<input type="checkbox"/>	**Comments	

1 - 5 of 5

Proxy Approval

For instructions on Setting up a Proxy or Acting as a Proxy Approver, see Appendix B: Approving EPAFs.

Appendix

The Appendix of this guide and following pages contain helpful “at a glance” guides to EPAF:

Appendix A: EPAFs for Student Assignments

- Student Position, Account, and Suffix Numbers
- Student New Hires
- Student Assignments
- Student Retro Salary Adjustment
- Student Assignment Termination
- Student Salary Increase

Appendix B: Approving EPAFs

- EPAF Approver Summary
- Approving, Acknowledge, or Return and EPAF
- Designate a Proxy Approver
- Act as a Proxy Approver

Appendix C: EPAF Reference

- Employee Classes
- Job Change Reasons
- EPAF Originator Summary
- Set Up Default Routing Queue

Appendix A: EPAFs for Student Assignments



Student Position, Account, and Suffix Numbers

Job Type	E-Class	Position Number	Account
Off Campus Work Study	BN	B49999	681020
Regular Non-Work Study	BB	B59999	680010
Campus Job Opportunity	BB	B69999	682010
On Campus Work Study	BC	B79999	681010
America Reads	BN	B89999	681000
Stipend	CC	C99999	680040

Revising the FOAP in an EPAF

IMPORTANT: All Student Assignment EPAFs require FOAP revision. You must know the FOAP to where the assignment is to be charged, and update it in the screen below.

COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
S	110000	622908	681000	1900					30.00
S	410101	339010	681010	1800					70.00
Total:									100.00

The above example shows the FOAP split for a Work Study position.

- Do not revise the 70% FOAP as it reflects the general Work Study account.
- Only revise the 30% FOAP to reflect the department account. Input appropriate **Fund**, **Organization**, and **Program**. Use the chart above to determine the correct **Account**.

Selecting Position Numbers and Suffixes

Use the chart above to determine appropriate **Position Number** to use for a Student Assignment.

To determine the **Suffix**, survey the employee's existing jobs and notice the other jobs *with the same position number* assigned to that employee.

Select the suffix number next in sequence that is not already used. If employee has no existing jobs, begin the sequence with "00".

EXAMPLE:

Existing Jobs						
Number and Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	
B59999-01 STUDENT ASSISTANT	1, USF	Aug 21, 2007		Mar 05, 2008	Active	
B59999-02 STUDENT ASSISTANT	1, USF	Aug 21, 2007		Mar 05, 2008	Active	

"03" is the next suffix number available in sequence, so "03" will be used for the new assignment. "00" is also available and can be used.

New Job

Position:

Suffix:



Student New Hires

EPAF Approval Category: STUNW1

In Step 1, use Approval Category STUNW1 if the student has never been employed at USF.

TIP: If you submit an Approval Category STUASN EPAF and receive the following error message, this signals that more information is required.

Errors and Warning Messages

Type	Message Type	Description
Student Assignments	ERROR	*ERROR* First Name, SSN, Birth Date, Sex Code or Ethnic Code incomplete.
Student Assignments	ERROR	*ERROR* First Name, SSN, Birth Date, Sex Code or Ethnic Code incomplete.
Student Assignments	ERROR	*ERROR* ID is not defined as an employee. Establish Employee record.

If you encounter this error, delete the STUASN EPAF and create another using Approval Category STUNW1.

Complete Step 3, the Student New Hire form like this example:

Student New Hire

Item	Current Value	New Value
ID:	20159551	20159551
Name Type:	LEGL, Legal	LEGL, Legal
First Name:	Minnie	Minnie
Last Name:	Mouse	Mouse
Middle Name:	M	M
Gender:	Female	Female
Ethnicity:	7, Unspecified	7, Unspecified
Citizenship:	Y, Citizen	Y, Citizen
Birth Date: MM/DD/YYYY	06/19/1979	06/19/1979
SSN:	123456798	123456798
Employee Class Code:	BB	BB
Home COAS:	S	S
Home Organization:	1	1
Distribution Orgn:	251001	251001
Timesheet Orgn:	P54111	P54111
Current Hire Date: MM/DD/YYYY	07/21/2008	07/21/2008
Job Begin Date: MM/DD/YYYY	07/21/2008	07/21/2008
Step:	0	0
Regular Rate:	10	10

Any data in Current Value must be entered in the New Value fields.

Name Type is "Legal."

Ethnicity is for the employee's self-disclosure. Leave at "7" and allow HR to update, unless an ethnicity is shown in the Current Value column, then match Current Value.

Citizenship must indicate "Y" for EPAF to be processed without errors. Confirm employee has visited Student Employment and has completed a Form I-9. Receipt of documents will be confirmed before the EPAF is approved.

Employee Class for Students is BB, or CC for student stipends.

Home Organization should indicate "1".

Distribution Orgn is where the employee's check will be distributed.

Timesheet Organization (or Payroll Organization, abbrev. P-ORG) links the employee's jobs record to their E-Timesheet and, in turn, their E-Timesheet to their specific supervisor/timesheet approver. This applies only to hourly employees - not stipends.

Current Hire, Job Begin, & Job Effective Dates should all be the same as Query Date in Step 1.

Annual Salary:	The fields highlighted to the left should ALL be left blank except when entering student stipend assignments, which are discussed below.	
Assign Salary:		
Contract Begin Date: MM/DD/YYYY		
Contract End Date: MM/DD/YYYY		
Factor:		
Pays:		
Contract Type:		Primary
Jobs Effective Date: MM/DD/YYYY		07/21/2008
Job Change Reason: (Not Overrideable)		NEWHR
Title:		Chemistry

Indicate "Primary" for a new hire **Contract Type**.

Indicate department name in the **Title** field.

Step 1

Define Employee, Query Date, and Approval Category

- In the **New EPAF Person Selection** Screen, provide student's **CWID** or search for student using the magnifying glass icon.
- **Query Date** is the first date of the pay period within which the student will begin their new position (please see Appendix on Query Date(s) for more detailed information).
- Select "Student New Hire, STUNW1" **Approval Category** (pictured on previous page).
- Click "Go".

Step 2

Job Selection

- In the **New EPAF Job Selection** screen, input the employee's new **Position** number and **Suffix**.
- Click "Create".
- NOTE: If under the "Existing Jobs" heading near the bottom left of the screen, there are listed position #'s and job information (e.g. a pre-existing position # B59999-00), then abort this New Hire EPAF as this signals that the student's employment record has already been established. Instead, enter the student's new assignment under the Student Assignments approval category (STUASN).

Step 3

Enter Main Job Information

- The first open field within the EPAF is **Name Type**. This should default to "LEGL, Legal".
- **Citizenship** should default to "Y, Citizen." If the student is not a citizen, select the appropriate status from the drop-down menu. Note: Please ensure that student has filed I-9 with student employment before completing EPAF.
- Enter the student's **Employee Class Code**.
- Enter "1" in the **Home Organization** field.
- Enter **Distribution Orgn** code where the employee's check should be distributed.
- Enter the employee's Payroll Organization # (P-ORG) in the **Timesheet Organization** field.

- Enter the student's hourly rate in the **Regular Rate** field. Leave the **Annual Salary, Assign Salary, Contract Begin** and **Contract End Date** fields blank (except in the case of stipends. See instructions below).
- Leave the **Factor** and **Pays** fields blank (except in the case of stipends. See instructions below).
- Enter the name of the hiring department in the **Title** field.

**** Student Stipend Assignments

In order to create a stipend assignment for a student employee, complete the EPAF per the instructions above but noting the following changes specific to stipends:

- In Step 2, enter "C99999" in the **Position** field, as this is the position # reserved for student stipends. The suffix should be 00 unless another student stipend assignment already exists for this employee. In that case, you would use the next number in sequence from the existing stipend's suffix (e.g. 01 if the current stipend is 00).
- In Step 2, enter the total stipend amount to be paid in the **Annual Salary** field. Leave the **Regular Rate** field blank.
- In the **Assign Salary** field, enter the amount the student should receive PER PAY PERIOD (this amount should equal the **Annual Salary** amount divided by the **Pays**).
- In the **Contract Begin Date** field, enter the same value that you've entered as the **Jobs Effective Date** above.
- The **Contract End Date** should equal the last day of the final pay period that this student is to receive their stipend. This should be either the 5th or the 20th of the month.
- The **Factor** and **Pays** fields should specify the number of pay periods across which this stipend is to be paid. These two fields should always be equivalent. Example: If a stipend begins on 07/06/2008 and ends on 08/05/2008, the **Factor** and **Pays** should both equal 2, as the time period specified covers 2 pay periods (07/06-07/20 & 07/21-08/05).

For instructions on Steps 4-7, including:

- Confirming or Revising FOAP
- Defining Approval Routing Queue
- Adding Comments
- Saving, Confirming & Submitting your EPAF

please refer to the section of this guide entitled Part I "EPAFs for Student Assignments."



Student Assignments

EPAF Approval Category:

Student Assignments, STUASN

The Student Assignments form is used to create new assignments for students.

Step 1

Define Employee, Query Date, and Approval Category

In the **New EPAF Person Selection** Screen, provide employee's **CWID** or search for employee.

Query Date is the pay period start date.

Select "Student Assignments, STUASN" **Approval Category** (pictured above).

Click "Go".

Step 2

Job Selection

In the **New EPAF Job Selection** screen, input the appropriate **Position** number and **Suffix**.

The following position numbers are reserved for student assignments:

- B49999** Off Campus Work Study
- B59999** Non Work Study
- B69999** Campus Job Opportunity
- B79999** On Campus Work Study
- B89999** America Reads
- C99999** Stipend

[RETURN TO EMPLOYEE MENU](#) [SITE M](#)

New EPAF Job Selection

Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: Chungro Lee, 11310253
Query Date: Jul 21, 2008
Approval Category: Student Assignments, STUASN

New Job

Position:

Suffix:

Existing Jobs

Number and Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
B59999-00 Student Hourly Special	211001, Arts and Sciences Dean	Jun 09, 2008			Active

To determine the **Suffix**, click the **All Jobs** button in the bottom left, survey the employee's **Existing Jobs** and note the other jobs *with the same position number* assigned to that employee.

Select the suffix number next in sequence that is not already used (e.g. If you are creating an assignment with position # B59999, and there already exist jobs B59999-00 and B59999-01, use the suffix of 02 for the new assignment that you are creating). If employee has no existing jobs, begin the sequence with "00".

For more details about **Position** number and **Suffix**, see Appendix document titled *Student Position Numbers and Accounts*.

Step 3

Enter Main Job Information

Job Begin Date is always the start date of a pay period except when the EPAF modifies a current assignment, then Job Begin Date should match the *Current Value*.

Job End Date must be left blank unless the EPAF modifies an assignment that already has an end date in the *Current Value*. In this case, type "-" (minus sign) to override the termination of the assignment.

Jobs Effective Date is the first day of a pay period (query date).

Job Status must indicate *Active*.

Step should indicate "0" for all student assignments.

- Enter hourly wage in **Regular Rate**. Leave **Annual Salary** BLANK unless creating a stipend assignment.
- For an explanation of **Assign Salary**, please see discussion of **Student Stipend Assignments** below.
- Options for **Contract Type**:
 - **Primary**: Every employee must have a "primary" job. If employee already has a primary job, select another option.
 - **Overload**: Additional assignments are "overload" jobs.
 - **Secondary**: Do not use for student assignments.
- **Contract Begin Date** and **Contract End Date** must be left BLANK, unless creating a stipend assignment (see below).
- Enter the student's **Timesheet Organization** number in the field of the same name. **Timesheet Organization** (or Payroll Organization, abbrev. P-ORG) links the employee's jobs record to their E-Timesheet and, in turn, their E-Timesheet to their specific supervisor/timesheet approver. This applies only to hourly assignments – not stipends.

Student Assignment

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY	06/09/2008	<input type="text" value="06/09/2008"/>
Job End Date: MM/DD/YYYY		<input type="text"/>
Jobs Effective Date: MM/DD/YYYY	06/09/2008	<input type="text" value="07/21/2008"/>
Job Status:	Active	<input type="text" value="Active"/>
Step:	0	<input type="text" value="0"/>
Regular Rate:	12	<input type="text" value="14"/>
Annual Salary:	24958.08	<input type="text"/>
Assign Salary:	1039.92	<input type="text"/>
Contract Type:	Primary	<input type="text" value="Primary"/>
Contract Begin Date: MM/DD/YYYY		<input type="text"/>
Contract End Date: MM/DD/YYYY		<input type="text"/>
Timesheet Orgn:	211001	<input type="text" value="P54111"/>
Title:	Student Hourly Special	<input type="text" value="Chemistry"/>
Factor:	24	<input type="text"/>
Pays:	24	<input type="text"/>
Job Change Reason:	NEWHR	<input type="text" value="SALAD, Salary Adjustment"/>

- Type in the name of the department employing the student next to **Title** (e.g. Chemistry).
- For an explanation of **Factor** and **Pays**, please see discussion of **Student Stipend Assignments** below.
- Select appropriate **Job Change Reason** from drop-down list (e.g. "ADJOB" to add a new assignment). Also refer to Appendix.

- Student Stipend Assignments
- In order to create a stipend assignment for a student employee, complete the EPAF per the instructions above but noting the following changes specific to stipends:
- In Step 2, enter "C99999" in the **Position** field, as this is the position # reserved for student stipends. The suffix should be 00 unless another student stipend assignment already exists for this employee. In that case, you would use the next number in sequence from the existing stipend's suffix (e.g. 01 if the current stipend is 00).
- In Step 3, enter the total stipend amount to be paid in the **Annual Salary** field. Leave the **Regular Rate** field blank.
- In the **Assign Salary** field, enter the amount the student should receive PER PAY PERIOD (this amount should equal the **Annual Salary** amount divided by the **Pays**).
- In the **Contract Begin Date** field, enter the same value that you've entered as the **Jobs Effective Date** above.
- The **Contract End Date** should equal the last day of the final pay period that this student is to receive their stipend. This should be either the 6th or the 20th of the month.
- The **Factor** and **Pays** fields should specify the number of pay periods across which this stipend is to be paid. These two fields should always be equivalent. Example: If a stipend begins on 07/06/2008 and ends on 08/05/2008, the **Factor** and **Pays** should both equal 2, as the time period specified covers 2 pay periods (07/06-07/20 & 07/21-08/05).

For instructions on Steps 4-7, including:

- Confirming or Revising FOAP
- Defining Approval Routing Queue
- Adding Comments
- Saving, Confirming & Submitting your EPAF

please refer to the section of this guide entitled Part I "EPAFs for Student Assignments."



Student Retro Salary Adjustment

Step 1

Define Employee, Query Date, and Approval Category

Click on link to employee’s current job to be changed

Query Date = current pay period start date
Approval Category = STUADJ (see drop down list)

Step 2

Job Selection

Click on the link to the job that is to be modified.

Step 3

Enter Main Job Information

Student Adjustments		
Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	06/01/2007	04/21/2008
Personnel Date: MM/DD/YYYY	08/21/2007	
Title:	STUDENT ASSISTANT	
Job Change Reason:	CONV	Not Selected
Regular Rate:	10.5	
Annual Salary:	10851.12	
Step:	0	0

Notes

- Compare *Current Value* to *New Value*, and only make changes to fields that change value.
- **Jobs Effective Date** is the first date of the current pay period.
- **Personnel Date** is the date the retro action is effective.
- Only fill in the following fields if there is a change from the *Current Value*: **Title, FTE, Step.**
- Fill in the new hourly **Rate.**
- Select appropriate **Job Change Reason** from list
- Indicate current value or “0” for **Step.**

For instructions on **Steps 4-7**, including:

- Confirming or Revising FOAP
- Defining Approval Routing Queue
- Adding Comments
- Saving, Confirming & Submitting your EPAF

please refer to the section of this guide entitled Part I “EPAFs for Student Assignments.”



Student Salary Increase

Step 1

Define Employee, Query Date, and Approval Category

Notes

Click on link to employee's current job to be changed.

Query Date = pay period start date

Approval Category = STUSAL (see drop down list)

Step 2

Job Selection

Click on the link to the job that is to be modified.

Step 3

Enter Main Job Information

Student Salary		
Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	06/01/2007	04/21/2008
Job Change Reason:	CONV	Not Selected
Step: (Not Overrideable)	0	0
Regular Rate:	9.36	
Annual Salary:	9673	

Notes

Current Value populates to guide the user to determine the *New Value*.

Jobs Effective Date = pay period start date (query date)

Job Change Reason = (refer to Appendix)

Step = "0"

Regular Rate = input hourly rate

Annual Salary = leave BLANK

For instructions on **Steps 4-7**, including:

- Confirming or Revising FOAP
- Defining Approval Routing Queue
- Adding Comments
- Saving, Confirming & Submitting your EPAF

please refer to the section of this guide entitled Part I "EPAFs for Student Assignments."

Appendix B: Approving EPAFs



EPAF Approver Summary

1. Access EPAF Approver Summary under the **Employee** tab.
2. Select **Electronic Personnel Action Form**.
3. Then select **EPAF Approver Summary**.
4. Locate EPAFs under one of the three tabs described below.

Current Select the Current tab to view EPAFs that require attention or approval.

Current **In My Queue** History

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Lennon, John On Campus Work Study, B79999-00	20155319	1301	Student Salary	May 13, 2008	Jun 06, 2008	Approve	<input type="checkbox"/>	Comments Warnings
McCartney, Paul On Campus Work Study, B79999-00	20155318	1304	Student Salary	May 13, 2008	May 21, 2008	Approve	<input type="checkbox"/>	Comments Warnings
Mermaid, Little Student Hourly Special, B59999-00	20155263	1299	Student Assignment	May 13, 2008	Jun 06, 2008	FYI	<input type="checkbox"/>	Comments Warnings

From this view, click on an EPAF to view, approve, return, or add comments. Or, check "action" and click "save" to perform required action directly from this screen. (see **highlighted** column above)

For information on how to approve EPAFs, see "Approving EPAFs."

In My Queue Select the In My Queue tab to view EPAFs that are in your queue for approval; however, they require approval at another level prior to yours.

Current **In My Queue** History

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Links
McDuck, Scrooge Library Assistant IV, D99790-00	20155260	1306	SH Staff Salary	May 13, 2008	Jun 01, 2008	**Comments
Richards, Keith On Campus Work Study, B79999-00	20155317	1308	SH Staff Salary	May 13, 2008	Jun 01, 2008	Comments Warnings

From this view, click on an EPAF to view or add comments.

History Select the History tab to view EPAFs that you have approved, acknowledged, or returned for correction.

Current In My Queue **History**

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Links
Fiasco, Lupe Student Hourly Special, B59999-00	20155328	1315	Student Salary	May 13, 2008	May 21, 2008	**Comments
Possible, Kim Administrative Assistant, H99983-00	20155262	1288	SH Staff Assignments	May 13, 2008	May 21, 2008	Comments

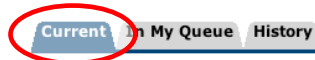
From this view, click on an EPAF to view or add comments.



Approving, Returning, and Acknowledging an EPAF

1. Access EPAF Approver Summary under the **Employee** tab.
2. Select **Electronic Personnel Action Form**.
3. Then select **EPAF Approver Summary**.
4. Follow instructions below.

Select the **Current** tab to view EPAFs that require attention or approval.



EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Lennon, John On Campus Work Study, B79999-00	20155319	1301	Student Salary	May 13, 2008	Jun 06, 2008	Approve	<input type="checkbox"/>	Comments Warnings
McCartney, Paul On Campus Work Study, B79999-00	20155318	1304	Student Salary	May 13, 2008	May 21, 2008	Approve	<input type="checkbox"/>	Comments Warnings
Mermaid, Little Student Hourly Special, B59999-00	20155263	1299	Student Assignment	May 13, 2008	Jun 06, 2008	FYI	<input type="checkbox"/>	Comments Warnings

Click on an EPAF that requires attention or approval.

Survey the individual EPAF.

If the Required Action for the EPAF is "Approve," the approver has two options:

- ✓ **Approve** *Approving an EPAF confirms the information is correct and authorized. The EPAF immediately becomes available for approval at the next level.*
- ✓ **Return For Correction** *This option returns the EPAF to the Originator. He or she may correct and resubmit the EPAF. Or it can be voided.*

If the Required Action for the EPAF is "FYI," the approver has one option:

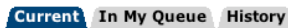
- ✓ **Acknowledge** *This option acknowledges the information that is shared in the EPAF. When an Approver is FYIed on an EPAF, he or she cannot approve or return it for correction.*

Add Comments

An Approver can **Add Comments** to the EPAF regardless of the required action or transaction status.

Approve in a Group

All EPAFs with a Required Action can be processed as a group by clicking on the box under **Action** or pressing **Select All** in the Current tab of the EPAF Originator Summary. After selecting the EPAFs to receive the Required Action, click **Save**.

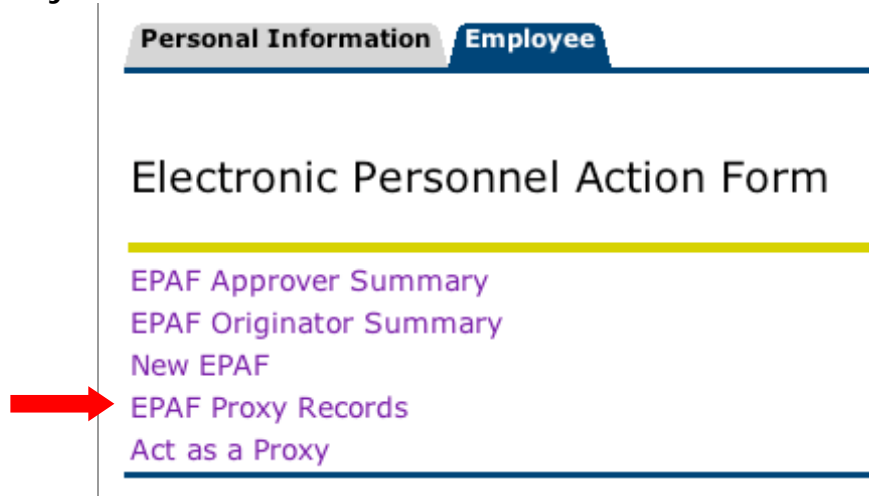


EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Lennon, John On Campus Work Study, B79999-00	20155319	1301	Student Salary	May 13, 2008	Jun 06, 2008	Approve	<input type="checkbox"/>	Comments Warnings
McCartney, Paul On Campus Work Study, B79999-00	20155318	1304	Student Salary	May 13, 2008	May 21, 2008	Approve	<input type="checkbox"/>	Comments Warnings
Mermaid, Little Student Hourly Special, B59999-00	20155263	1299	Student Assignment	May 13, 2008	Jun 06, 2008	FYI	<input type="checkbox"/>	Comments Warnings

Designate a Proxy Approver

1. Go to **Electronic Personnel Action Form** under the **Employee** tab.
2. Select **EPAF Proxy Records**.

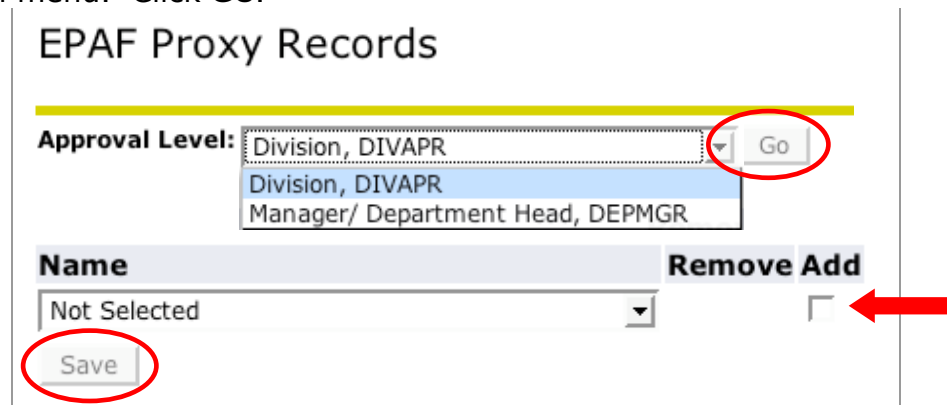


Personal Information Employee

Electronic Personnel Action Form

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

3. Select the **Approval Level** for which you wish to designate a Proxy Approver from the drop down menu. Click **Go**.



EPAF Proxy Records

Approval Level: Division, DIVAPR

Division, DIVAPR
Manager/ Department Head, DEPMGR

Name	Remove	Add
Not Selected	<input type="checkbox"/>	<input checked="" type="checkbox"/>

4. From the **Name** drop down menu, select the individual to designate as the Proxy Approver.
5. Check "Add" next to the individual's name, then click **Save**.

To remove a Proxy Approver from your Proxy Record, check "Remove" next to the individual's name, then click **Save**.

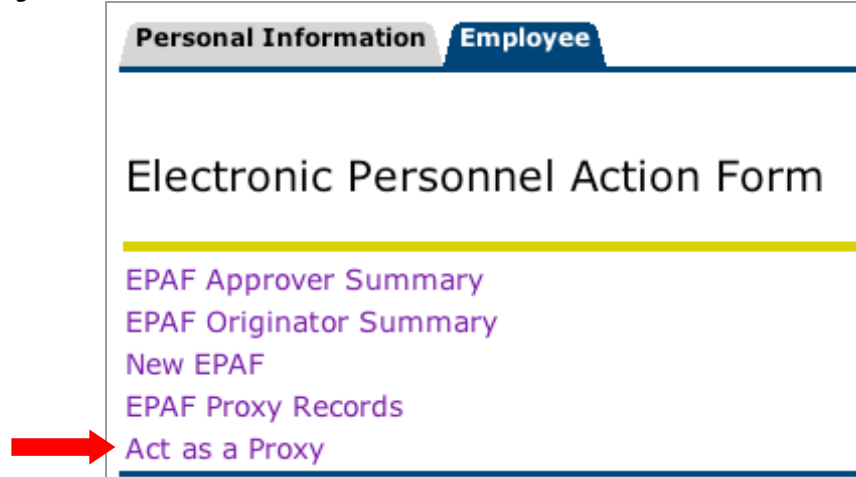
IMPORTANT:

When designating a Proxy Approver, be advised that the proxy must have security access at the designated approval level. He or she must have a completed EPAF Security Application on file with USF Payroll.



Act as a Proxy Approver

1. Go to **Electronic Personnel Action Form** under the **Employee** tab.
2. Select **Act as a Proxy**.



3. Select the individual you wish to **Proxy For** with the drop down menu.
4. **Submitted From Date** and **Submitted To Date**: Leave blank if you want to see all EPAFs that require this individual's approval. Or input submission date parameters.
5. Click **Go**.

The screenshot shows a form with the following fields: 'Proxy For:' with a dropdown menu showing 'Self'; 'Submitted From Date: MM/DD/YYYY' with an empty text box; 'Submitted To Date: MM/DD/YYYY' with an empty text box; 'Transactions Per Page:' with a dropdown menu showing '25'; and a 'Go' button which is circled in red.

6. You will have access to approve, acknowledge, or return EPAFs at the approval level for which you have been designated by the EPAF Approver.

See Appendix document titled "Approving EPAFs" for instructions on approving, acknowledging, and returning EPAFs.

IMPORTANT - To perform the proxy function:

1. You must have security access at the levels for which you will approve EPAFs. So, you must have an EPAF Security Application on file with USF Payroll.
2. You must be a designated proxy by the original approver. See Appendix document titled "Designate a Proxy Approver."

Appendix C: EPAF Reference



Employee Classes (E-Class)

Payroll Cycle *	E-Class	Description
MO	AA	USFFA Full Time Faculty
MO	LL	Executive Administrators
MO	LF	Monthly Administrators
MO	QQ	Monthly Stipend
MO	QQ	Part Time Non-Teaching
MO	SS	USFFA Part Time Faculty
MO	TT	ALP Full Time Faculty
MO	UU	Law Librarians
MO	VV	USFFA Librarians
MO	WF	Faculty Off Cycle
MO	XX	Part Time Faculty Non-Union
MO	ZZ	CPS Full Time Faculty
<hr/>		
SH	BB	Student Hourly
SH	BC	Student Work Study (on campus)
SH	BN	Student Work Study (off campus)
SH	CC	Student Stipend
SH	DD	OPE Full Time
SH	EE	OPE Part Time
SH	FF	Non Union Non Exempt Hourly
SH	HH	Non Union Non Exempt Salary
SH	II	Non Union Hourly (Regional Campus)
SH	JJ	Public Safety Officer Salary
SH	KK	Public Safety Officer Hourly
SH	MM	Gardeners and Laborers Salary Local 1877
SH	NN	Gardeners and Laborers Hourly
SH	PP	Engineers Hourly Local 39
<hr/>		
SM	GG	Semi Monthly Administrators
SM	GT	Staff Who Teach
SM	RR	Semi Monthly Stipend

*** Payroll Cycle Definitions:**

- MO Monthly Administrators, Faculty, and Librarians
- SH Semi-Monthly Hybrid
includes non-exempt, hourly, students, OPE, etc.
- SM Semi-Monthly Exempt Staff



Job Change Reasons

Banner Name	Description	Banner Name	Description
ACRBI	Across the Board Increase	RTNFT	Return to Full-time Status
ADJOB	Add a New Assignment	RTNPT	Return to Part-time Status
AGREM	Per Agreement/Continue Benefits	SABBE	Sabbatical End and/or Cancel
ANNIN	Annual Contract Increase	SABBL	Sabbatical Leave
AWARD	Awards	SALAD	Salary Adjustment
CHNG2	Change in Assignment	SALRA	Salary Range Adjustment
CHNG3	Change in FTE Status	SETTL	Settlement
CLASS	Classification Changes	STD	Short Term Disability
CONT	Continuation of Assignment	STEPI	Step Increase
CONV	Conversion	STPAW	Stipend Award
DEMTN	Demotion	SUSP	Suspension
EARLY	Early Retirement	SUSPR	Return from Suspension
EDLV	Education Leave	TEMP	Temporary Assignment
EMERT	Emerti Salary Reduction	TERM	Termination of Employment
EQUIT	Equity Adjustment	TERMA	Term Appointment to Probation
EXAPT	Extension of Appointment	TITLE	Job Title Change
FMLA	Family Medical Leave Act	TRMAS	Termination of Assignment
FOAP	FOAP Change	TRSFR	Transfer
HRTAD	Hourly Rate Adjustment	UNPL	Union Seniority Protection LV
INACT	In-Acting Position	WCMP	Workers Compensation
JOBCN	Job Cancelled		
JOBRC	Job Reclassification		
JOBTC	Job Title Change		
LAYOF	Layoff		
LOAWP	Leave of Absence with Pay		
LTD	Long Term Disability		
MERIT	Merit Increase		
MILI	Military Leave		
MKTAD	Market Adjustment		
NEWHR	New Hire (use only for new hire to USF. See REHIR, CONT, ADJOB, etc.)		
NWTRM	New Term		
PDEV	Professional Development		
PDL	Pregnancy Disability Leave		
PFL	Paid Family Leave		
PLWOP	Personal Leave Without Pay		
POSN	Position Number Change		
PRBIN	Probationary Increase		
PROMO	Promotion		
PROV	Provisional Appointment		
REHIR	Rehire		
RETPA	Retiree Payment		
RETRN	Return from Professional Development Leave		
RETRO	Retroactive Change		
RTINA	Return from In-Acting Position		
RTLOA	Return from Leave of Absence		

BOLD = frequently used



EPAF Originator Summary

1. Access EPAF Originator Summary under the **Employee** tab.
2. Select **Electronic Personnel Action Form**.
3. Then select **EPAF Originator Summary**.
4. Locate EPAFs under one of the two tabs described below.

Current Select the Current tab to view EPAFs that have been created and saved, but not submitted.



EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Fiasco, Lupe Student Hourly Special, B59999-00	20155328	1313	Student Salary	May 13, 2008	Jun 06, 2008	Return for Correction	Comments
Possible, Kim Adjunct Professor, S77901-00	20155262	1314	Student Salary		Jun 06, 2008	Waiting	Comments

This is also the originator's "inbox" for EPAFs that have been Returned For Correction.

EPAFs can be of the following **Transaction Status**:

Waiting EPAF has been created and saved – but not submitted.

Return for Correction EPAF has been returned to you for correction. Revise and resubmit the EPAF. Or void the EPAF.

History Select the History tab to view EPAFs that have been submitted.



EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Marie, Anna Student Hourly Special, B59999-00	20155333	1311	Student Salary	May 13, 2008	Jun 06, 2008	Pending	Comments Warnings
McFadden, Darren Student Hourly Special, B59999-00	20155327	1312	Student Salary	May 13, 2008	May 21, 2008	Approved	Comments
Possible, Kim Administrative Assistant, H99983-00	20155262	1288	SH Staff Assignments	May 13, 2008	May 21, 2008	Pending	Comments

EPAFs can be of the following **Transaction Status**:

Approved EPAF has been approved at all levels and has been applied to the payroll file.

Pending EPAF is waiting for approval.

Return For Correction EPAF has been returned to the Originator for correction.

View or Revise a Submitted EPAF

Submitted EPAFs can be viewed by selecting the **History** tab and clicking on the EPAF. EPAFs with any transaction status can be viewed.

To revise a submitted EPAF, click on the EPAF. If the EPAF has not been approved, the originator may select **Return For Correction** then click **Update**. Once update is saved, the EPAF must be submitted again.

Note: An Originator may add comments to the EPAF at any level in the approval process. Click on the EPAF and select **Add Comment**.



Set up a Default Routing Queue

A Default Routing Queue allows the user to customize the routing queue for every Approval Category, or type of EPAF, that he or she creates.

Follow these steps to customize and save Default Routing Queues:

1. Under Employee Tab in USF Connect, select **Electronic Personnel Action Form**
2. Select **EPAF Originator Summary**
3. Select **Default Approval Queue**
4. Select the specific *Approval Category* from drop-down list
5. Fill in the open data fields, using the magnifying glass search function, for each required approval level (see worksheet below)
6. Fill in an open data field and select **FYI** under *Required Action* if you want to FYI an approver on this type of EPAF (optional)

Approval Category Worksheet

Instructions: Below is the approval category for which you create EPAFs. Determine the specific approves for levels 20 & 30. Then, follow instructions above and set up the Default Routing Queue for each Approval Category you will use.

Approval Category Type: **Student Assignments**
 E-Classes: BC, BB, BN, CC

Approval Level	User Name	Required Action
20 - (DEPMGR) Manager/ Department Head		Approve
40 - (SEMPLOY) Student Employment	PRADO Norma P Prado	Approve
90 - (PAYROL) Payroll	CONCEPCION Reuben Madrid Concepcion	Approve
99 - (FINPAY) Final Applier	CONCEPCION Reuben Madrid Concepcion	Apply

Approval Categories for Student Assignments are as follows:

- STUASN**, Student Assignment
- STUTER**, Student Assignment Termination
- STUADJ**, Student Retro Adjustments
- STUSAL**, Student Salary
- STULBR**, Student Labor Distribution
- STUNW1**, Student New Hire (only for new employees)
- STUEND**, Student Termination of Employment (terminates employment with USF)



EPAF Security Application

This application is for security access to HR Banner EPAF. Please complete and return it to Human Resources by fax to (415) 386-1074 or ext. 4437. Or scan and e-mail EPAF@usfca.edu. Completion of this application is required for HR Banner EPAF access.

Application Date: _____

Name _____ CWID # _____

E-mail _____@usfca.edu Ext. _____ Dept. _____

Part I – ORIGINATOR Access

Are you an ORIGINATOR? (circle) Yes No (if no, go to Part II)

List all E-Classes for which you originate EPAFs: (example: DD, XX, BC)
(see reverse for list and definitions of E-Classes)

- | | |
|----------|----------|
| 1) _____ | 5) _____ |
| 2) _____ | 6) _____ |
| 3) _____ | 7) _____ |
| 4) _____ | 8) _____ |

Select the categories of employees for which you originate EPAFs:

- Student Assignments
- Staff Assignments
- Faculty Assignments

List all of the budget organization numbers for which you originate EPAFs:
(example: 714001)

- 1) _____
- 2) _____
- 3) _____
- 4) _____

If you originate EPAFs for an entire department or division, indicate it here. Or, list additional budget organizations if necessary.

Do you know who approves your EPAFs? (circle) Yes No

If yes, indicate the individual(s) name or HR Plus "operator number" here:

Department Level _____

Division Level _____

Part II – APPROVER Access

Are you an APPROVER? (circle) Yes No

If yes, indicate the level(s) on which you approve EPAFs:

- Department (list departments) _____
- Division (list divisions) _____

EPAF Security Application *(cont.)*

Banner Employee Classes (E-Class)

Payroll Cycle	E-Class	Description	Former HR/Plus Job Code
MO	AA	USFFA Full Time Faculty	A
SH	BB	Student Hourly	B
SH	BC	Student Work Study (on campus)	B
SH	BN	Student Work Study (off campus)	B
SH	CC	Student Stipend	C
SH	DD	OPE Full Time	D
SH	EE	OPE Part Time	E
SH	FF	Non Union Non Exempt Hourly	I, 3
SM	GG	Semi Monthly Administrators	G
SM	GT	Staff Who Teach	S
SH	HH	Non Union Non Exempt Salary	H
SH	II	Non Union Hourly (Regional Campus)	5
SH	JJ	Public Safety Officer Salary	J
SH	KK	Public Safety Officer Hourly	K
MO	LL	Executive Administrators	L
MO	LF	Monthly Administrators	F
SH	MM	Gardeners and Laborers Salary Local 1877	M
SH	NN	Gardeners and Laborers Hourly	N
SH	PP	Engineers Hourly Local 39	P
MO	QQ	Monthly Stipend	Q, 4
MO	QQ	Part Time Non-Teaching	4, X, S
SM	RR	Semi Monthly Stipend	R
MO	SS	USFFA Part Time Faculty	S
MO	TT	ALP Full Time Faculty	T
MO	UU	Law Librarians	U
MO	VV	USFFA Librarians	B
MO	WF	Faculty Off Cycle	W
MO	XX	Part Time Faculty Non-Union	X
MO	ZZ	CPS Full Time Faculty	Z

*** Payroll Cycle Definitions:**

SH Semi-Monthly Hybrid (includes non-exempt, hourly, students, OPE, etc.)

SM Semi-Monthly Exempt Staff

MO Monthly Administrators, Faculty, and Librarians