University of Idaho
Human Resources

Electronic Personnel Action Form (EPAF) – User Guide

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Other EPAF Materials

EPAF Supplemental Material (Handout)

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Other Resources for your EPAF Needs: http://www.uidaho.edu/human-resources/system-users

- ✓ EPAF Decision Tree—Excel file for assistance in deciding EPAF Approval Category
- ✓ EPAF FAQ and Tips—Frequently Asked Questions and Tips for EPAF Users
- ✓ Deferred Pay Processing—Info about Deferred Pay codes (if applicable)
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EPAF – Terms to Know and Definitions

What is an EPAF? The University of Idaho uses the Electronic Personnel Action Form (EPAF) in BANNER to create employee records and to update these records when changes occur. This information is used to generate an employee's timesheet and to ensure that the employee is paid timely and accurately

Who is an Originator? An Originator is the designated departmental personnel authorized to create EPAFs. It is your task to correctly input the necessary information within the EPAF. This is a very important role as you are the first step in making sure that an employee's appointment is accurately set-up and maintained within Banner

Who are the Approvers? Once an EPAF is submitted, Approvers are the individuals authorized to review and approve the information within an EPAF. Often, there will be multiple Approvers required for a single EPAF as they contain information requiring review or approval from specific areas. For example, many EPAFs require approval from the Budget Office to ensure financial accuracy and compliance. Another example includes the Provost's Office who reviews EPAFs specific to faculty. Human Resources is the final approver and is responsible for its application to Banner

Board Appointed- Board Appointed positions (BA) is a position that is approved by the State Board of Education. Includes Classified, Exempt, Post Doc Fellows, Faculty, and Graduate Assistants

Temporary Help-PERSI – PERSI is an acronym for Public Employee Retirement System of Idaho. Positions are PERSI eligible if they are non-student and work 20 or more hours for 5 or more consecutive months. Also known as T1 positions (see employee class), or IP (approval categories). PERSI positions are reported to the State of Idaho through the Employee Information System (EIS) since November 15, 2009

Temporary Help-Non-PERSI - Temporary Help position (TH) filled by Students and Work-study, or Non-Students less than 20 hours per week or 5 consecutive months

Position Authorization Form – PAF as it is commonly known, it gives you the authorization for a Board Appointed position. It provides the much of the information needed for an EPAF. This document is required for Board Appointed positions and may be required for Temporary Help positions. The form is filled out by the department to request the position, and then sent to the Budget Office with a copy to the Affirmative Action Coordinator. You can find the PAF at www.uidaho.edu/provost/policyguidelines/appointmentletters. Then you select Position Authorization Form (PAF).xls

EPAF Approval Category- The reason for an update or change, this is the six-letter characteristic for each EPAF Approval. There are unique characteristics of each category, including employee type (Classified, Exempt, Faculty, Graduate Assistant, Temporary-PERSI, Temporary, Student and Work-Study), new or previous PCN, Employee Class, Appointment Type, Board Appointed Funding (Permanent or Temporary), and the transaction you are working on. This information must be correct or we do not receive funds for payroll from the state. PERSI positions are a big part of making sure the information is correct. Be sure to select the correct Approval Category

EPAF Training Supplemental Material: There are two versions of this information, one is a word document (EPAF Training Supplemental Material) and the other is in Excel (EPAF Supplemental Material Workbook). The word document is provided as a companion to this training manual. You can also work with the Excel version to quickly access the information you'll need for creating an EPAF

EPAF Decision Tree: The EPAF Decision Tree is an excel workbook that takes you through the process of selecting the right EPAF Approval Category. It is hyper-linked so you connect to the correct category, e.g. Classified, Faculty, Exempt, Temporary, etc. From there you also select Permanent or Temporary; for Temporary positions, you select PERSI Eligible, Non-PERSI Eligible or Work-Study. There are more selections and questions to answer, but the Decision Tree will help you get to the code you'll need

Descriptors for Positions– The following are various codes related to a position:

- **FTE –** Full Time Equivalent: measure the percentage of time assigned to a position. 1.0 = full-time. 0.5 = half-time →**Example:** Employee works 40 hours per pay period. FTE is calculated by dividing the hours per pay period by 80. (40 / 80 = 0.5 FTE)
- **Hours –** Typically the hours worked for a position. It is calculated by using the Hours per Day (8 for full time) times 10 working days - Hours per Pay (8 x 10 = 80). Be careful with additional appointments for the same employee not to have the sum of all hours be greater than 80. You may need to modify other positions to have fewer hours
- **Pay Grade –** Grade associated with the pay for the Classified and Exempt Positions. The Pay Grade for a position will be identified on the Position Authorization Form (PAF)
- **Employee Class** describes the type of employment, earnings, hours per bi-week / % of time associated with an employee. Each position is dependent upon the selection of the correct Employee Class. Refer to the Employee Class Descriptions Table in the Supplemental Material (Page 8 or select Employee Class Definitions in Workbook)
    - Board Appointed: Faculty (F1, F2…), Exempt (E1, E2…), Post-Doctoral (P1, P2…), Classified (C1, C2…) and Graduate Assistants (GA)
    - Student and Temporary Help (TH): TH-PERSI Eligible (T1), TH-Non-PERSI Eligible (T4), Student (ST), Work-Study (SF, SI), and Unit Pay (T5)
    - Other: Retirees (R1), Additional Comp (AC) and Cell Phone / Vehicle Stipends (CM)
- **PCN** is the Position Control Number, a six digit code assigned to each position. For Board Appointed positions, the PCN will be given to you on the Position Authorization Form (PAF) or it will be provided to you by the Dean / Director Level. For Temporary Help, we have designated PCNs that must be used according to the job type worked by the employee (see Supplemental Material)
- **Suffix** is the two digit code assigned to each position to clarify its type of position (see Supplemental Material)
- **Job Location –** Physical location of the job and most positions are located in Moscow, so double check that this entry line says Idaho. Always be sure of the job's location and that it's properly selected in the EPAF. This location is needed for taxation purposes and worker's compensation by the Payroll Office

Appointment Types- It is important to know the appointment type for an employee to select the correct Approval Category. Use Banner to determine the job history for an employee. Go to NBAJOBS and a query date of **01-01-96** to search for all previous job history. Appointments are as follows:

- **Original Appointment**- When a person has never held a position with the University in the past. If an employee is working in a Temporary Help Non-PERSI or Work Study position and begins working in a PERSI or Board Appointed position, their EPAF will need to use an Original Appointment, there can be a second original appointment
- **Additional Appointment-** When a person adds a second job while already holding an active position. Exception: you cannot add a Board Appointed position to a Temporary Help position; you must use reappointment or original appointment, which will set the new position as primary
- **Reappointment-** When the employee has a break-in-service, meaning he/she has worked for the University in the past and will have a point in between the old and new position where they do not hold an active job
- **Change-** When a person makes a lateral transfer from one active board appointed position to another board appointed position, or a lateral transfer from one active IP (PERSI) position to another IP (PERSI) position
- **Promotion-** When a person makes a change to a new PCN for a higher paying job or a job with the title of a higher pay grade without conducting a search. Only used for board appointed employees
- **Continued Appointment -** Departments can extend the job without a break-in-service

Temporary Help Position Titles – We must type the titles exactly as they appear on the EPAF Supplemental material (use these tables for the Title, PCN, Suffix and Employee Class Codes)

Board Appointed Position Titles – They have such a large range of titles that they often must be abbreviated in a certain manner. It is for reporting purposes. They can vary depending upon position type

- The position title is the official title for the position. It is abbreviated in Banner. Examples:
  - Position Title – Administrative Assistant 2. Banner Title – Administrative Asst 2
  - Position Title – Program Specialist. Banner Title – Program Splst
- For Graduate Assistant positions, the title **MUST BE** either ***Research Assistant*** or ***Teaching Assistant***
- Use the Banner Title from the Results Oriented Job Description (ROJD). Be careful not to use the Working Title, which is for internal use for a position. E.g. Administrative Assistant 2 may have a working title of Office Manager
- Any questions on Board Appointed Position Titles, please contact Classification & Compensation at hr-classcomp@uidaho.edu
- For Permanent Faculty positions, the title will be Academic Faculty unless the Provost's Office instructs otherwise. They will review these EPAFs to ensure correct title usage
- For Temporary Faculty positions, the title structure is different than for the previous groups. Please enter the appropriate title in one of the following formats (see chart at right)

Temp Faculty-Lecturer
Temp Faculty-Visiting Faculty
Temp Faculty-Acting
Temp Faculty-Associate
Temp Faculty-Clinical

Pays- The number of pay checks within a fiscal year. Each business day in a bi-week equals 0.1, so one pay period equals 1.0. You count only business days M-F, not weekends. If a full time benefit eligible employee chooses deferred pay, the Pays should be 26 regardless of the jobs effective date or begin date

Factors- The actual pay periods an employee physically worked in a fiscal year. It usually is the same as Pays except for the Academic Faculty with deferred pay (spread pay would be factor 20, pays 26). If Academic Faculty chooses not to spread pay then the pays and factors should be 19.5. A Classified Employee with a 10-month appointment has two options: (1) spread pay = 26 pays/factors or (2) no spread pay then count the pay periods accordingly

RPR—Retroactive Pay Request - Late pay added to an active job with prior Jobs Effective Date covered. Requires a Retroactive Pay Request form. More detail covered on the form

Special Check request - Late pay that cannot use RPR if there is no active job; Requires a Special Check Request form and a fee ($75)

Payroll Calendars: There are several different Payroll Calendars that can assist with determining the correct EPAF dates. They are available online at http://www.uidaho.edu/payroll/calendars, and in the Supplemental Material Workbook

- Payroll and Approval Deadlines – FY 20xx: Organized by Fiscal Year (July – June), this calendar shows the Effective Dates, Pay Dates, EPAF Deadlines, when Timesheets are available and Approval Deadline for each Pay Period of the Fiscal Year. Watch for the EPAF Deadline! (2nd Tuesday of each Pay Period) Remember you can post an EPAF at any time in the pay period. Approval Deadlines can also vary according to department
- 3-Year Fiscal Calendar – Organized by Fiscal Year, with three total fiscal years. Includes the year previous and the future year. It shows each pay period (or bi-week) with highlighted UI holidays
- Academic and Fiscal Payroll Dates - FYxx – Shows the Payroll & Contract dates for:
    - Fiscal Year-Paid over 12 months, 2080 hours total, 26 Pays/Factors
    - Academic Year-Paid over 12 months (Deferred Pay)—1560 hours total, 26 Pays / 20 Factors
    - Academic Year-No Deferred Pay—1560 hours total, 19.5 Pays/Factors
    - Academic Semesters-No Deferred Pay—Fall Semester (720 hours), Spring Semester (720 hours)
    - Summer Session-No Deferred Pay—13 weeks

EPAF Dates – Various dates are important for an EPAF. See the following dates and definitions:

Jobs Effective Date: MM/DD/YYYY
Personnel Date: MM/DD/YYYY
Job Begin Date: MM/DD/YYYY
Current Hire Date: MM/DD/YYYY
Seniority Date: MM/DD/YYYY

- Query Date-Auto-fills in today's date for the EPAF field. You enter the date the transaction should occur or earlier. The query date does not affect Banner. It is tied to the Labor Distribution screen
- Jobs Effective Date-The date that a particular part of the EPAF will take effect, usually in the current pay period. It can be a date prior to the current pay period, if it is an Original Appointment or appointment to New PCN
- Personnel Date-Date meant to show when a particular employee transaction should have occurred. Since you cannot update job information prior to the Last Paid Date, you may not always be able to change it on the actual date of change. Or you may miss the EPAF deadline for the pay period. It is recommended to note there will be the calculation of a retroactive pay request (RPR) or special check in the EPAF Comments (see RPR & Special Check request on the next page)
- Job Begin Date-Date used when the employee is appointed into a job that he/she has never held before. Same as jobs effective date with an original appointment
- Current Hire Date-Date used only for brand new employees to the University of Idaho or for employee returning to work after break-in-service, or a transfer from non-benefit eligible position to a benefit eligible position
- Seniority Date-Reflects a promotion or reclassification, resulting in a change of title and pay (a pay increase may not apply in all situations). Seniority Date will change when employee has a break-in-service
- Contract Begin / End Date-Used only for Board Appointed employees. Defines the period the employee will begin and end a particular job during the current fiscal year (FY)
- Termination Date- All Temporary Help positions have a future end date within the EPAF; some are known at the time it is created and some end dates are not. You can use the Academic and Fiscal Payroll Dates (from the Supplemental Material) to determine the term date for the position, if applicable

Transaction Status within an EPAF:

- *Waiting*: Still sitting in the originator's queue. If the EPAF still has a status of *WAITING*, it needs to be submitted. When the EPAF has been submitted, the transaction status will change from *WAITING* to *PENDING*
- *Approved*: The EPAF has been forwarded to the Human Resource queue
- *Return/Correction*: An error has been found by an Approver and returned to the originator for correction. Look in the *COMMENTS* section for information on what needs to be corrected. An e-mail will be sent to the originator once the EPAF has been returned. **Do NOT reply to that automated email! – epafcorrections@uidaho.edu**
- *Completed*: The EPAF has been applied; Double Check that this stage occurs!

EPAF Routing Queues. All EPAF's go through an approval queue before they are applied to the system. This queue varies dependent upon the position type, individual college / department policies and approval type. As the EPAF travels down the Routing Queue after submission, it will change Status as it moves from queue to queue. You will see the following routing queue statuses:

- *In Queue*: The EPAF is waiting for the next person to approve. You'll see all those in the queue by those that have In Queue as their status
- *FYI*: This is for those that have no approval, but need to have this for their information
- *Pending*: The EPAF has been submitted and is in the approver's queue (the person or group who has the EPAF)
- *Approved*: The EPAF has been forwarded to the next approver in the queue
- *Applied:* The EPAF has been applied to the system

Remember it takes time to go through approvals, so it's better to post early in the pay period!

What is a Pay Period? A pay period is the two week time span during which an employee works. The time is then calculated over the following two weeks and converted into a pay check/direct deposit. A pay period generally runs like this (see below). We show two pay periods to show the relationship between the two. EIS is the Employee Information System (State of Idaho). We report to EIS each and every pay period

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
Beginning of Pay Period # 2						
8	9	10	11	12	13	14
		EPAF Deadline for Pay Period # 2	EPAF Processing + EIS File (Thursday Deadline)		PAYDAY from Pay Period # 1	End of Pay Period # 2
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
15	16	17	18	19	20	21
Beginning of Pay Period # 3		Time-sheet Deadline-Pay Period # 2				
22	23	24	25	26	27	28
		EPAF Deadline for Pay Period # 3	EPAF Processing + EIS File (Thursday Deadline)		PAYDAY from Pay Period # 2	End of Pay Period # 3

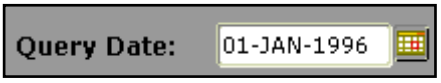
Before You Start an EPAF - Gather ALL needed information before starting!

For example, all departments are required to use a Position Authorization Form (PAF) for Board Appointed positions, but each department has a different method for giving their Temporary Help EPAF information to the Originator. Some have created their own form, while others use email or an office memo

Verify the employment history of the employee in Banner: If the employee has worked for the University in the past, it will affect the EPAF Approval Category for your transaction

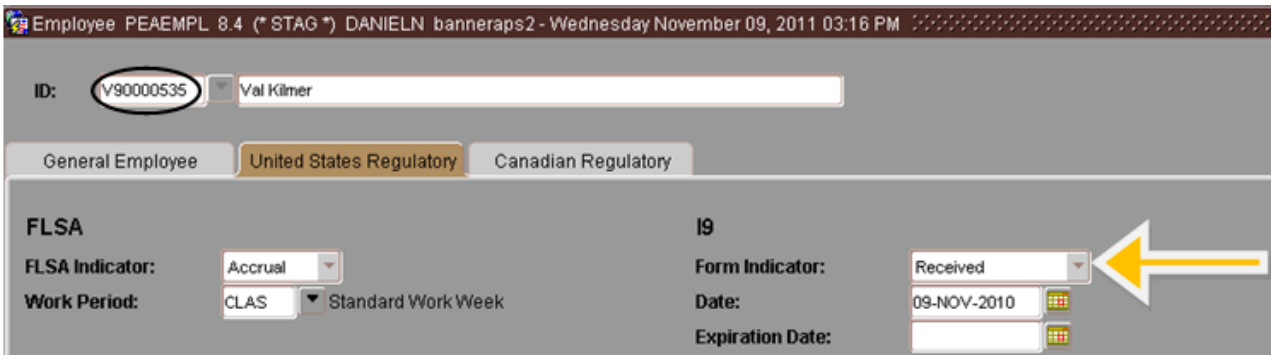
1. Go to www.banner.uidaho.edu, click on Banner and then Login into Banner Production (**not Banner Self Service**)
2. Type NBAJOBS in the "Go To…" box and hit enter
3. Type-in the V-number for the employee and tab
4. In the Position field, select Shift + F6 or hit the drop-down menu and select NBIJLIST (List of Employee's Jobs)

5. On the next screen, choose 01-JAN-1996 as your query date. This will ensure that you get all positions for this employee



	Position	Suffix	Begin Date	End Date	Job Type
>>	007520	00	18-SEP-2011		Primary
	007785	00	16-JUN-2003	25-JUN-2010	Primary
	009000	05	10-JUN-2001	24-JUN-2003	Secondary

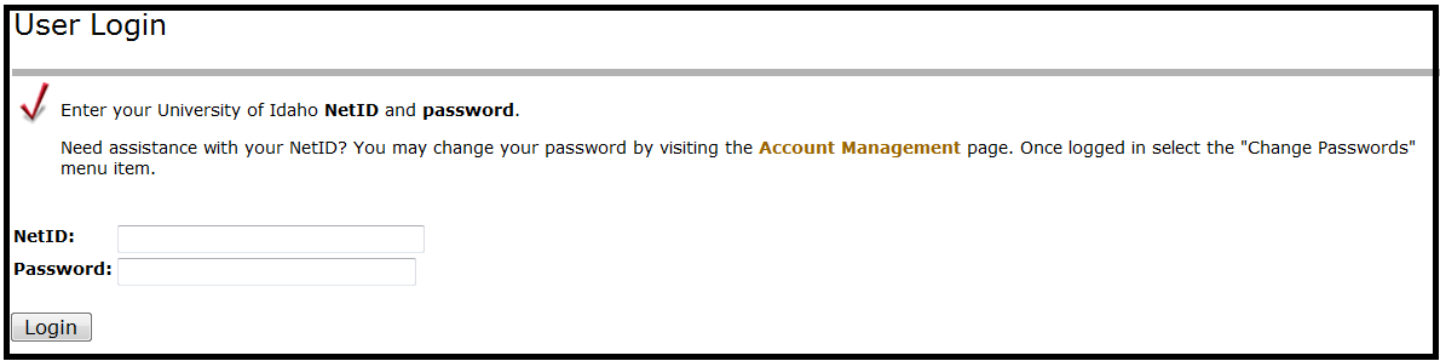
Verify the employee's I-9 date in Banner: If the employee has worked for the University in the past, you will need to verify that the I-9 information has not expired. If the I9 date is more than 3 years old, the employee will need to go to Human Resources to re-certify their I-9. To find that date, use the steps below:



1. Type PEAEMPL in the "Go To…" box and hit enter
2. Type-in the V-number for the employee and page down
3. Click on the United States Regulatory tab
4. Look under the I9 section for the Date. Check to make sure it is not more than 3 years old. If it is, then they will need to fill out new I-9 paperwork at Human Resources

EPAF Time!

1. To log on into Production, go to https://vandalweb.uidaho.edu/PROD/twbkwbis.P_WWWLogin and enter your **NetID** and **Password** for University of Idaho Vandal Web. Select the Employee Menu tab or click Employee Information, then click EPAF Originate/Approve, then click New EPAF under the Electronic Personnel Action Forms

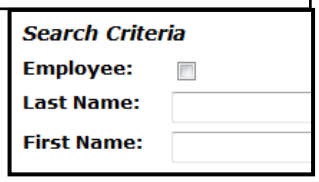


***For training, we use **Banner Self-Service Staging** so no real EPAFs are actually entered into the system*

Creating a Board Appointed EPAF

Appoint Brad Pitt as a Budget Specialist and he is new to the University of Idaho. He starts working at the beginning of the current pay period. The position will be a full time, fiscal year appointment. This is a Permanent Funded Classified position. His hourly rate will be $15.25. The position number 007548. Your department's budget number is UBX025

1. Select the Employee: If you already know the employee's V-number, enter it into the first open field entitled "ID" (at right). If not, then click on the magnifying glass to open up the Person Search window. On the next screen, select the appropriate Brad Pitt and it will return you to the first screen with that info entered into the "ID" section



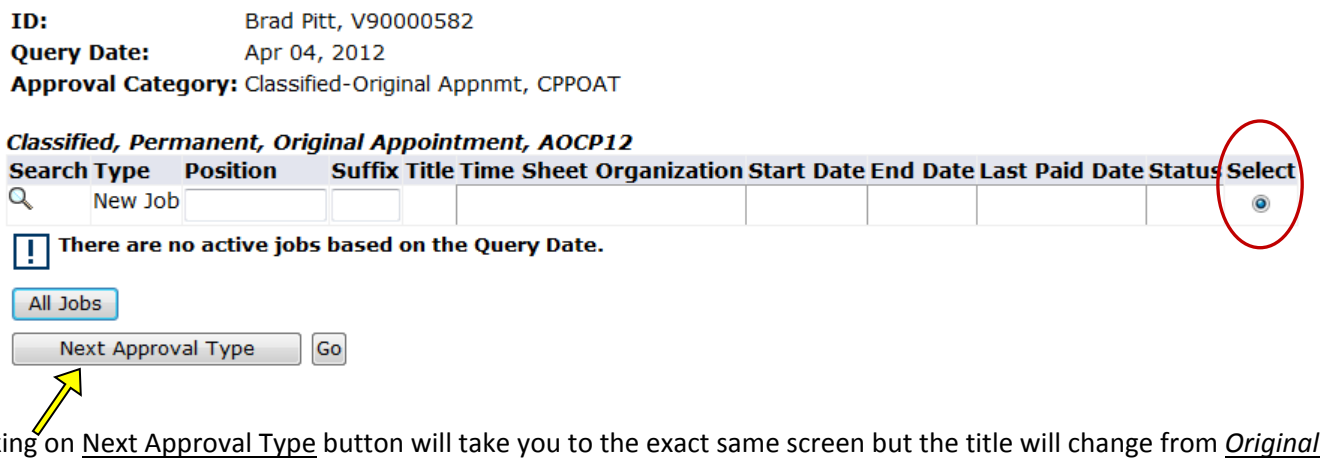
By entering Last Name, First Name into the Search Criteria, you will be able to search for his V-number. Click Go. Check the Employee box to limit the search to an Employee (e.g. current employee). Enter additional information to search for the employee (see box at right)

2. Enter the Query Date: The Query Date for this EPAF should be the date Brad Pitt is supposed to start work. In this case, it would be the first day of the current pay period. Using the Payroll Calendars (also in the supplemental materials excel file), enter that date in the proper format (MM/DD/YYYY)

3. Select the Approval Category: By clicking on the drop-down box below the Query Date, a list will be provided of all available appointment types and changes that can be applied to a new or current employee. Each has a short description followed by a specific six-lettered EPAF approval code for when it is applied. We need to scroll down to the sections to that pertain to the EPAF: Common, Classified, Exempt, Faculty, Graduate Assistant, T4 / ST Non-PERSI, T1 PERSI, and Work Study. Choosing the appropriate category in advance is advised. A paper version for all EPAF Approval categories is included in the supplemental information. You can also use the EPAF Decision Tree and other info in the EPAF Supplemental Workbook

4. Enter the Position Control Number (PCN): For Board Appointed positions, the PCN will be given to you on the Position Authorization Form (PAF) you receive. For Temporary Help, we have designated PCNs that must be used according to the job type worked by the employee (see supplemental material)

What is the PCN and suffix? Once you enter those codes into the screen shown below, it will flood in some basic information. Notice that this approval type is the ***Original Appointment***. Make sure the "Select" radio button (far right) is checked next to the PCN you just entered. If this person had multiple jobs, then it automatically selects their previous position. So ALWAYS double check the "Select" radio button to make sure it will build the EPAF for the correct job



Clicking on Next Approval Type button will take you to the exact same screen but the title will change from *Original Appointment, AOIH* to ***Labor Distribution, MB***. You will need to re-enter the PCN, suffix and click "Select" at the end of the same line. Click Next Approval Type again; it will change from ***Labor Distribution, MB*** to ***TH-Termination of Job***. Re-enter the same PCN and suffix as before, check the "Select" button, and click the Go button. *FYI: Sometimes you will not need to re-enter the PCN as it will flood in. Be sure to still double check the "Select" button. Also, there will not always be multiple approval types; it all depends on the type of EPAF you are submitting*

5. Transfer the Job Information into the EPAF: After clicking Go, you will be transferred to the form where you will enter all the data given to you for this EPAF. If the data line has "(Not Override able)" next to it, then Banner has already flooded in the correct information and it cannot be changed. The first section appears (see at right)

5.1 Dates: Enter the dates for your EPAF using the correct format: **Jobs Effective Date:** MM/DD/YYYY

5.2 Hourly Rate: In this case, you see that it says Hourly Rate, which was provided in the original information given to you for this EPAF. Enter the rate without a dollar sign (0.00). Exempt and Faculty positions are paid on a salary basis which means their EPAF will ask for the annual salary

5.3 FTE: Full Time Equivalent. Calculation is Hours per Pay / 80. Example: ½ time position, 40/80 = 0.5 FTE

5.4 Hours per Day: Hours per Day are given to us based on the FTE

5.5 Hours per Pay: This is the Hours per Day times # of work days in a Pay Period (8 x 10 = 80)

5.6 Factor: The actual pay periods an employee physically worked in a fiscal year. Check the payroll and approval deadlines sheet to see how many pay periods remain. This will be your factor

5.7 Pays: The number of pay checks within a fiscal year. Each business day in a bi-week equals 0.1, so one pay period equals 1.0. You count only business days M-F, not weekends

5.8 Job Employee Class Code / Employee Class Code: The job employee class corresponds with the position. The employee class corresponds with the employee. Most of the time, they should be the same, but if there is more than one position, the Employee Class Code can be different

5.9 Timesheet Orgn / Organization Code: The Timesheet Orgn and Home Organization codes are the specific rollup code assigned to the department for which this job will be operating under. The three digit code should be the same for BOTH entries. If you know this code for your department, go ahead and enter it. For training purposes, you may use 906 as a substitute

5.10 Job Location: This will always default to Idaho, but it is necessary for payroll that this be updated to the actual location if different. *FYI: If the location is not present in the drop down list, then email the Payroll Office payroll@uidaho.edu to create the appropriate location for you to then select*

6. Enter the Labor Distribution: The next section of the EPAF defines what budget from which the compensation will be expensed. Often, the budget info will flood in on its own and will only require review for accuracy, as it did in this case. The Index represents the actual budget number for the position. The Account Code (E code) is an expense number used to differentiate between salary types. To determine which Account Code to use, refer back to the supplemental material. REMEMBER, although this information floods in, it may not be correct! Double check everything!

If you are only using one budget to fund the position, then it should reflect 100%. This number should only be decreased if the position will be funded by multiple budgets. In either case, the total must equal 100% to ensure a full paycheck

Labor Distribution, UB9950-05 TH-Clerical/Tutor

Current
Effective Date: 10/31/2010

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date

New
Effective Date: MM/DD/YYYY 10/31/2010

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
9	UBX019	U11009	UBX019	E4110	07GAX					100.00

7. Save the Information: It would be a good time to save all the information you just entered. Find one of the Save buttons on the screen and click it

- ✓ Watch for the six-digit Transaction number and Transaction Status at the top of the screen

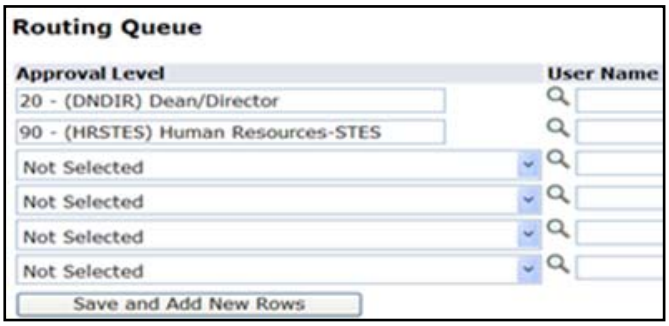
Name and ID: Brad Pitt, V90000582
Transaction:
Transaction Status:
Approval Category: Classified Permanent Original Appointment, CPPOAT

Query Date: Apr 04, 2012

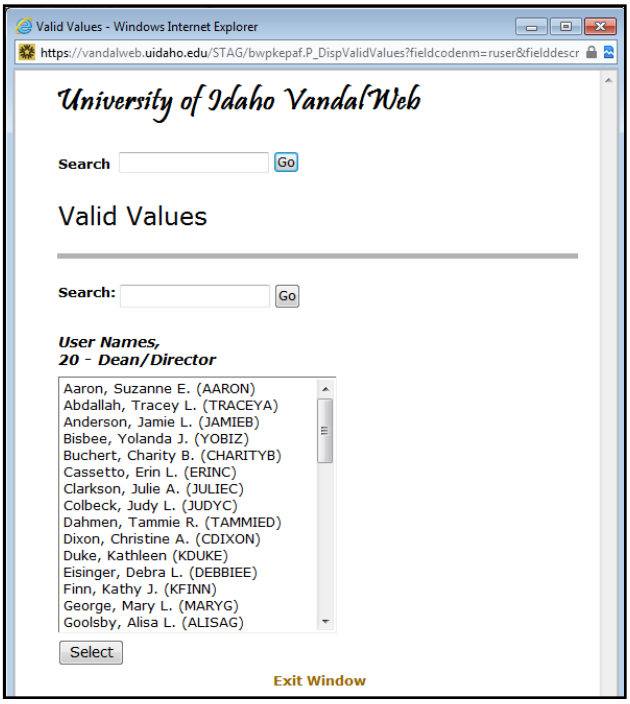
Save

The next change you will notice when you scroll down is that the Account Code is missing from the Labor Distribution: In order to verify this E-code, re-enter it and click Save again. This will return you to the top of the screen but the E-code will now be in place

8. Routing Queue: The Routing Queue for any EPAF has a pre-designed list of approver levels. Select the correct approver for each level. Some will be relative to your department, while others are a pre-set selection. Clicking on the magnifying glass will open a window displaying a list of all available options for that approver level



FYI: If you have multiple windows on your desktop, this list will pop up behind your screen and you will have to minimize all windows to see it



For this example, select your department's Dean/Director level, and then use the **pop-up** list to **select** the rest

9. Comments (Enter Relevant Information into Comments): The originator of an EPAF transaction must enter comments clearly explaining and documenting the intent of the EPAF. The comments are required and a legal record; they must not be tampered with

- Include your name & phone number so you may be contacted if there are any questions or if clarification is needed
- Provide a brief explanation as to the purpose of the EPAF
- Include all financial calculations for Board Appointed positions so the Budget Office can understand your entries
- Hiring method – ATS Search # or search waiver
- Position Authorization Form (PAF) Number
- Deferred Pay, Salary Calculations, Termination Date
- RPR—Retroactive Pay Request (late pay added to the next paycheck); this requires an RPR form
- Special Check request (late pay that cannot use RPR); this requires a Special Check Request
- Make comments regarding terminated employee leave payoff / transfers to ensure that leave is handled correctly. It is assumed that leave will be paid out to terminated employee with their last paycheck automatically unless otherwise stated in the comments. Be sure to include termination date!
- Keep all comments precise, brief and professional. Please refrain from using inflammatory and inappropriate statements

Once you have entered your comment, click **Save**. It will take you back to the top of the screen, and then scroll down to the comment section. You will not see your comment, but don't worry it is saved. You can click on the tiny light bulb on the right side of the comment window. This will take you to an overview screen where you can view the EPAF as others will see it; your comment will be at the bottom. REMEMBER: You cannot update or submit from this screen, it is only an overview. To finish this EPAF, click **Update** and it will return you to the entry version

11. Review and Submit: If no errors occur after saving, proceed by scanning down the EPAF and looking over each entry for accuracy. Once you have checked all areas, click Submit. Once again, you will be returned to the top of the screen, where it will show you any errors or inform you that it has been successfully submitted. *You may print the EPAF screen for your own record*

Temporary Help EPAF Guidelines

Approval Categories: Refer to the EPAF Supplemental Material for the Approval Categories. What is the correct approval category? Be careful when it comes to Student (ST) and Non-Student (T4) Temporary Help categories. In addition, watch for the PERSI Eligible positions (T1)

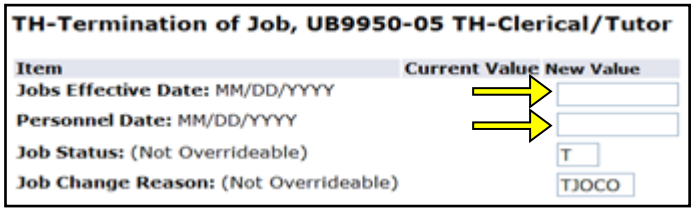
PCN / Suffix Combos: Refer to the EPAF Supplemental Material. Be careful to select the proper PCN and suffix for Student and Temporary Help and PERSI positions. Watch for additional positions to select Suffix (e.g. Student 06, 16, 26… / Temp Help 05, 15, 25…). Employee Class is also important, selecting ST for student and T4 for non-student temporary help

Hours: Remember to watch for temporary help additional positions to put the total hours above 80 per Pay Period. In this example, you would need to modify the other positions to have fewer hours

Pays and Factor: For Temporary Help positions, the Pays and Factor should be 26 / 26 as the default information

Termination Date: All Temporary positions have a future end date; some are known at the time the EPAF is created and some are not. For Temporary Help Non-PERSI EPAFs, a termination section has been created as these positions have a known termination date. If a termination date is unknown, you may give a maximum of one year from the job begin date. You may use the last day of pay period or the last day of the academic/fiscal year

- Remember to use specific Job Change Reason Codes (see Supplemental Material) for selecting the right code from the drop-down menu for terminations. The Jobs Effective Date for terminations should be the actual Termination Date, last day of employment



Creating an EPAF Proxy for Originators

Every EPAF creator/originator needs to set-up a proxy on NTRPROX. This proxy will be able to access EPAFs in Banner as a backup and make corrections

EPAF Originator (Creating the Proxy)

- Each originator must have at least one proxy identified
- An assigned proxy must have completed EPAF training

Step	Action
1	Access **NTRPROX** in Banner

2	**Page Down**
	• Level Code should say DPCHR or DNDIR
	  o If No: email finaccess@uidaho.edu with your Banner user id to get access
	  o If Yes: **Page Down**

3	Enter the Banner user id of the person who will be your proxy. **F10 (Save)**

EPAF Originator Proxy (How to access an EPAF)

- The Proxy is used as backup to aid in keeping the flow moving through the individual queues
- Approval Queue proxy access is through *Vandal Web*
- Originator proxy access is through *Banner* only (see below)

Step	Action
1	Log into **Banner NOAAPSM**
2	Insert **Proxy For** user id
3	Change **Transaction Status** to Return/Correction
4	Change **Queue Status** to None (Originator)
5	**Page Down** This shows EPAFs that have been returned for correction and you need to correct • Highlight ID • Use **Options** and go to **PAF Detail Information (NOAEPAF)**
6	Access **Other Information and Comments** tab to read what correction needs to take place.
7	Access tabs and make changes as needed.
8	• Make sure that all comments are addressed and the corrections made. • Insert comments reflecting that the changes were made. **F10 (Save)**
9	Use **Options** and click on **Submit Transaction** to process. EPAF is now back in Approval Queues.