



University of Idaho
Human Resources

Electronic Personnel Action Form (EPAF) User Guide

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EPAF Terms to Know and Definitions	Pages 2 - 6
Employment Process Flowchart and Description	Pages 6 - 9
How to Enter an EPAF	Pages 10 - 13

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. Work Study EPAFs have to be approved by Financial Aid. Human Resources is always the final approver and is responsible to apply the EPAF in Banner

- **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 People Admin or it will be provided to you by the Dean / Director Level
- **Suffix** is the two-digit code assigned to each position to clarify its type of position (see Supplemental Material)
- **Job Titles associated with a Position:**
 - **Student and Temporary Help Position Titles** – we have designated the PCNs and job titles that must be used per the job type worked by the employee. See the EPAF Supplemental Material for more info and the tables for these Student and Temp Help positions
 - **Board Appointed Position Titles** – The position title is assigned in Banner within the form **NBAPOSN**. This position title will flood into your EPAF when you enter it. If you need to change a position title, that may take a **PeopleAdmin** action or you may need to contact your AAC
 - For Research Assistants, the title is defaulted to **Research Assistant**
 - For Teaching Assistants, the title is defaulted to **Teaching Assistant** (*it can be changed to **Support Assistant***)
 - For benefit eligible Faculty positions, the title is assigned in Banner within the form **NBAPOSN** and is subject to review by the Provost's Office to ensure correct title usage
 - For Temporary Faculty positions, it is set by the Provost's Office please enter the appropriate title in one of the following: Temp Faculty – Lecturer; Temp Faculty – Visiting Faculty; Temp Faculty – Acting; Temp Faculty – Associate
 - Any questions on Board Appointed Position Titles, please contact provost@uidaho.edu or Classification & Compensation at hr-classcomp@uidaho.edu
- **Annual Salary or Hourly Rate** – For Faculty, Exempt and Postdoc positions, you use the Annual Salary for a position. For Classified and other Temp Help positions, you will use an Hourly Rate
- **FTE** is the Full Time Equivalent for a position and it measures the percentage of time assigned to a position. 1.0 = full-time. 0.50 = 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). There is no FTE for some Temp Help positions, they just use the Hours per Pay
- **Hours per Day / Hours per Pay** – This is 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 exceed 80 hours per Pay. You may need to modify other positions to have fewer hours through a Miscellaneous Change
- **Pays** – The number of pay checks within a fiscal year. Each business day in a pay period 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, the Pays should be 26 regardless of the jobs effective date or begin date
- **Factor** – The actual pay periods an employee physically worked in a fiscal year. The Factor is typically the same as Pays, except for the following examples:

- Academic Faculty with Deferred Pay (Factor 20, pays 26). We **do not offer deferred pay** to any new employees
- Academic Faculty working August to May, their Standard Pays and Factor are 19.5 / 19.5
- Classified Employee with a 10-month appointment, you would count the pay periods accordingly (e.g. 22 / 22, 24 / 24)

➤ **Employee Class Codes** describes the type of employment, earnings, hours per pay period / % of time associated with an employee or job. There are two fields to fill out:

1. **Employee Class Code** (for the employee)
2. **Job Empl Class Code** (Employee Class for the Job)

For example, an employee can have two different jobs (e.g. E2, F9) and their Employee Class Code would be Full Time (E1). [Refer to the Employee Class Descriptions Table in the Supplemental Material]

- **Timesheet Orgn** and **Home Organization** describe the department or college for a position (timesheet org) and the Home Organization (for an employee). An employee can be in one Home Organization, but have multiple Timesheet Organizations (Orgn) for each job, especially for Temp Help positions
- **Job Location** – Physical location of the job, you must select a Job Location. This location is needed for taxation purposes and worker’s compensation by the Payroll Office
- **Earnings Codes** – this describes the Default Earnings for a position. It is related to the Employee Class Descriptions Table

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

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
Beginning of Pay Period # 2		Timesheets 5 PM		Return of Actual Last Paid Date		
Payroll Processing (Pay Period # 1)						
8	9	10	11	12	13	14
		EPAF Deadline 5 PM	EPAF Processing Sending EIS File		PAYDAY!! \$\$ For PP # 1	End of Pay Period # 2

- **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:

- Payroll and Approval Deadlines
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 submit an EPAF at any time in the pay period
 - Approval Deadlines can also vary according to College and 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 with highlighted UI holidays. One Box = One Pay; Fiscal Year = 26 Pays
- Academic and Fiscal Payroll Dates
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) – 1600 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 (520 hours)

Employee Types associated with a Position. This impacts the EPAF Approval Category.

- **Board Appointed-** Board Appointed positions (BA) is a position that is approved by the State Board of Education. Includes Classified, Exempt, Post Doc Fellows, and Faculty.
- **Graduate Assistant (GA)** – Teaching Assistant (Support Assistant) and Research Assistants.
- **Temporary Help-PERSI (T1)** – 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 Controller through the Employee Information System (EIS) since November 15, 2009
- **Temporary Help-Non-PERSI (T4 / ST)** - Temporary Help position filled by Students and Work-study, or Non-Students. These positions can be appointed maximum for one year.

EPAF Approval Category – This is the six-letter characteristic for each EPAF Approval. There are unique characteristics of each category, including employee type, new or previous PCN, Suffix (Permanent, Contingent or other), Appointment Type, and the transaction you are working on. Be sure to select the correct EPAF Approval Category to avoid having to **VOID** the EPAF and start over

Appointment Types – It is important to know the appointment type for an employee to select the correct EPAF Approval Category. Go to **NBAJOBS** and a query date of **01-01-96** to search for all previous job history

- **Original Appointment** – 1) When a person has never held a position with the University in the past
2) If an employee is working in a Temporary Help Non-PERSI or Work Study position and begins working in a TH PERSI (T1) or Board Appointed position, their EPAF will need to be an Original Appointment, there can be a second original appointment
 - **Positions we report to State:** Classified, Exempt, Faculty, TH PERSI (T1)
 - **Positions we do NOT report to State:** Graduate Assistants, T4/ST non-PERSI, Work Study, Unit Pay, Summer Session, Additional Compensation
- **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 or from active IP (PERSI) to board appointed 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, this EPAF categories will bypass I-9 date

EPAF Dates:

- **Query Date** – This is the first date you enter when selecting an EPAF. It does not update anything within Banner.
 - The Query Date auto-fills in **today's date**. Do **NOT** use today's date unless the job begins today. You can use a date in the future as well.
 - The Query Date should equal the Job's Effective Date of the EPAF, e.g. the date the **transaction should occur**

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

- The Query Date is tied to the effective date of the Labor Distribution section (MB); this means the Query Date will flood into the Labor Distribution Date. You **must select** a Query Date that is prior to or equal to your Labor Distribution Date
- Jobs Effective Date – The date that the EPAF will take effect, usually in the current pay period
 - The Query Date must be on or before the Jobs Effective Date – always!
 - For an Original Appointment, the Begin Date on the I-9 and the Jobs Effective Date in the EPAF should match to be compliant
 - The Jobs Effective Date must be greater than the Last Paid Date when changing the information for current employees, e.g. the current Pay Period
 - If the EPAF is submitted late, the Personnel Date can be used to reflect the actual date the transaction should have occurred. An example is a Change of Pay that should have been effective earlier. It is recommended to note the calculation for a retroactive pay request (RPR) or special check in the EPAF Comments
 - It can be a date prior to the current pay period (even if submitted after the EPAF deadline). This means it can be back dated to the **actual date** the transaction should have occurred.
 - There is no Last Paid Date conflict because the employee has **never been paid** on this PCN and Suffix. All dates should be the SAME for the following appointments:
 - **ALL** Original Appointments; Reappointment or Additional Appointment to a New PCN / Suffix
- Personnel Date – Date meant to show when an 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 (include RPR or Special Check Comments)
- 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 to a benefit eligible position
- Seniority Date – Represents the first day in this job/PCN and is used to calculate “time in responsibility” for staff target salaries
 - When there has been a break-in-service and they are now re-hired, the Seniority Date will start over
 - In most cases, the seniority date will change when they move to a new job/PCN
 - If an employee moves laterally from one position to another that is deemed by Human Resources to be “the same”, the seniority date from the first job will carry forward to the new position. This is rare
 - If a Human Resources Market Rate Review warrants a significant change to the benchmark and market rate, the unit will be asked to reset the seniority date or move the employee to a different PCN indicating they are in a new role
- Contract Begin / End Date – Used only for deferred pay employees. Defines the period the employee will begin and end a 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 if not known at the time, then give maximum one year of employment. You can use the Academic and Fiscal Payroll Dates calendar to determine the term date for the position, if applicable

Other notes on EPAF Dates

- Please note that for Graduate Assistants, Temporary Faculty and Temporary Help positions, all dates can be the same – for Original Appointments, Reappointments, Additional Appointments, Continuations and Change Appointments. It is not necessary to worry about Job Begin Date, Current Hire Date, Seniority Date, etc.
 - Be sure to select the correct Query Date, Jobs Effective Date, Personnel Date and Labor Distribution dates for that PCN and Suffix (typically for the current Pay Period or their First Day of Work for Pay)

Transaction Statuses 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 epafcorrections@uidaho.edu automated email.**
- 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

Employment Process Flowchart

The Employment Process Flowchart includes information about the Employment Authorization (I-9), EPAF (from Submission, Approvals, Review, and EPAF Applied). Then the steps are EPAF Reports, Deductions Setup, Employee Information System (EIS) and Departmental Supervisor Setup. This process includes the following individuals and/or departments:

- New Employee
- Human Resources (Employment Services, Front Desk)
- Department / College
- Payroll / Benefits

(1) New Employee: Offer Letter; Background Check (if needed)

- Offer Letter
 - Formal Searches (see info below) or informal job appointments: student and temp help positions can be informal, either a conversation or email
 - Anticipated Start Date
- Background Check (if needed)
 - You should always know if a position requires a background check.
 - Formal Searches: see the info below for the steps with the formal searches (Background Check, EPAF Dates and Offer Letter)
 - Informal Searches: the new employee should know if a background check is necessary for their position
 - All Background Checks should be completed prior to visiting HR for completion of their Employment Authorization

PeopleAdmin Searches and EPAFs

For all searches in PeopleAdmin, we will need certain codes from within PeopleAdmin to be added to the EPAF comments. We need an Action Number.

Action Number – The Action Number is representative of the Position Authorization process. Once the position has been authorized by all parties, the Action Number will be one of the following examples:

- Faculty Positions = **F000013A**
- Staff (Classified, Exempt, Post-Docs, etc.) = **SP000012A**
- Temp Help = N/A. No Action Number is required for Temp Help positions

Note that the Action Number is found in the “Position Management” section within PeopleAdmin and is associated with the PCN for a position. A search for the PCN can produce the Action Number

Background Check, EPAF Dates and Offer Letter

There are 4 steps when an Action is created within PeopleAdmin:

1. Approvals (AACs, HRAI, HRS, Executive Approver, etc.)
2. Contingent Offer
3. Background Check – Background Check initiated and in process
4. Hired – Pending – Background Check has successfully completed
 - Note the EPAF submission and the start date are determined **after** the successful Background Check is completed. The Background Check can be done at any time before a formal offer. Don't delay—contact crimcheck@uidaho.edu
 - Note: The start date of the position **cannot** pre-date the background check date.

Search Waivers or Reappointment: A background check may still need to be done if one has not been completed in the last 13 months (send email to crimcheck@uidaho.edu to find out if one is needed)

(2) Human Resources: Employment Authorization

The next step in the process is the Employment Authorization with Human Resources. The new employee will visit HR with their Employment Documents to authorize them to work. HR will always ask two things of an employee:

- (1) What is your Anticipated Start Date?**
- (2) Is a background check required for your position?**

After the employee has completed their Employment Authorization, there is a 1-3 business day delay to process for Human Resources. Once the info has been processed, an Electronic Personnel Action Form (EPAF) can be submitted for the employee. Questions on Employment Authorization can go to hr@uidaho.edu

(3) Department / College, Human Resources (Employment Services), Payroll / Benefits: EPAF Submission (Vandal Web): EPAF Approvals, EPAF Review, EPAF Applied

The next steps deal with the EPAF Submission. This includes:

- Department / College:
 - EPAF Submission (Vandal Web)
 - EPAF Approvals: Dean/Director, Provost Office, Grad Studies, Financial Aid, Budget Office
- Human Resources (Employment Services): EPAF Review, EPAF Applied

From EPAF Submission through EPAF Approvals and EPAF Review, the arrows are “multi-directional” meaning that at times you can submit an EPAF and it can be “**Returned for Correction**” OR to “**VOID and resubmit**”, which includes starting the EPAF over again. Throughout the EPAF process, there are four primary issues that can be “automatic” return for correction or **VOID** actions, including:

1. **PCN** – Position Control Number, a six-digit number assigned to a position
2. **Suffix** – a two-digit code assigned to a position to clarify the type of position
3. **EPAF Approval Category** – unique identifier for the EPAF that includes the employee type, new or previous PCN, and Appointment Type
4. **EPAF Dates** – to ensure you have the correct dates for these personnel actions

We will review these concepts throughout this EPAF Training, but it is very important to keep them in mind. It will ensure that you have less EPAFs returned for correction or having to **VOID** and EPAF and start over.

(4) Human Resources (Employment Services, Front Desk), Payroll / Benefits: EPAF Applied, EPAF Reports, Deductions Setup, Employee Information System (EIS) Department / College: Employee Training, Supervisor Assignment

The next stage of the review is having the EPAF Applied (Employment Services), EPAF Reports (Employment Services, Front Desk), Deductions Setup (Payroll / Benefits), Employee Information System (EIS, Employment Services). After an EPAF is applied, there are several processes that are run:

- **EPAF Reports** – The Front Desk will review EPAFs that have been applied
- **EPAF Reports and Deductions Setup** – Payroll and/or Benefits will have the employee's deductions setup. This typically includes an email to the employees to setup their Direct Deposit and W4 Instructions. It can also include a Benefits email for selecting their Benefit Deductions online through MyBenefits
- **Employee Information System (EIS)** – Employment Services reports the info to the State Controller's Office

The Department / College is involved in the **Supervisor Assignment** through the Supervisor Assignment Tool, available at <https://www.uidaho.edu/human-resources/managers/supervisor-assignment>

The Employee Training is involved once an EPAF is applied in the system. The employee can then take the training available through BBLearn and GoSignMeUp. Please note there can be a delay of 12-24 business hours for the feed process to send the new employee info into these systems after the EPAF is applied. You can check the EPAF Status to see if it has been applied.

This is the overall view of the [Employment Process Flowchart](#). It is important to know where you are in the process, where the delays can occur, etc.

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

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/banner , then Login into Banner Production
2. Go to **NBAJOBS** in Banner search/navigation bar.
3. Enter the V-number for the employee and tab
4. Always use **01/01/1996** as your query date. This will ensure that you get all positions for this employee
5. In the Position field, select the drop-down menu and select “List of Employee’s Jobs (NBIJLST)
(Note: you can also go directly into NBIJLST when researching Employment History)

Query Date: * 01/01/1996

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 Banner search/navigation bar.
2. Enter 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 see if it is not more than 3 years old. If it is and if employee has a break in services, then they will need to fill out new I-9 paperwork at Human Resources

The screenshot shows the Banner HR system interface for employee Val Kilmer (ID: V90000535). The 'United States Regulatory' tab is selected. Under the 'I9' section, the 'Form Indicator' is set to 'Received' and the 'Date' is '09/20/2017'. A yellow arrow points to the date field. Other fields include 'FLSA Indicator' set to 'Accrual' and 'Work Period' set to 'CLAS'.

Time to Enter an EPAF!

To start an EPAF, go to https://vandalweb.uidaho.edu/PROD/twbkwbis.P_WWWLogin and enter your **NetID** and **Password** for University of Idaho Vandal Web. Select the **Employees** tab and click **Electronic Personnel Action Forms**, then click **EPAF Originate/Approve**, then click **New EPAF**.

When it comes to creating EPAFs, remember you **must have** the following sources of info: (1) EPAF Approval Category, (2) Position Control Number (PCN), (3) Suffix and (4) EPAF Dates

The screenshot shows the 'User Login' page. It features a red checkmark icon and the instruction: 'Enter your University of Idaho NetID and password.' Below this, there is a link for assistance: 'Need assistance with your NetID? You may change your password by visiting the Account Management page. Once logged in select the "Change Passwords" menu item.' At the bottom, there are input fields for 'NetID:' and 'Password:', and a 'Login' button.

Creating an EPAF

1. Select the Employee: If you already know the employee's V-number, enter it into the first open field entitled "ID". If not, then click on the magnifying glass to open the Person Search window.

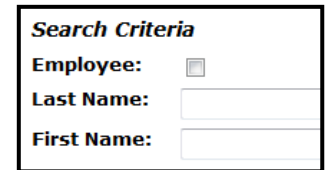


* - indicates a required field.

ID: * 

On the next screen, select the appropriate person by clicking on the vandal number, it will return you to the first screen with that info entered in the "ID" section

By entering Last Name, First Name into the Search Criteria, you will be able to search for the V-number. Click [Go](#). Check the Employee box to limit the search to an Employee (e.g. current employee).



Search Criteria

Employee:


Last Name:

First Name:

2. Enter the Query Date: The Query Date for this EPAF should be **the date this transaction supposed to occur**. In this case, it would be the first day of the current pay period. Using the Payroll Calendar, enter that date in the proper format (**MM/DD/YYYY**)



Query Date: MM/DD/YYYY *

Approval Category: * 

3. Select the Approval Category: By clicking on the drop-down box below the Query Date, a list will be provided of all available approval categories that can be applied to new or current employee. Each has a short description followed by a specific six-lettered EPAF approval code for when it is applied. See below for the order of EPAF Approval Categories. Determining the appropriate category in advance is advised. The EPAF Approval Categories are in the following order within the drop-down menu:

- Common EPAF Approval Categories and Common to each Employee Class:
 - T4 / ST, Work Study, GA, PERSI, Classified, Exempt, Faculty
- EPAF Approval Categories for each Employee Class
 - T4 / ST, Work Study, Unit Pay
 - Temp Help PERSI, Faculty Non-Benefit Eligible, GA, Classified, Exempt, Faculty
 - Affiliate EPAFs


After you have selected the Employee's V-Number, entered the Query Date and Selected the Approval Category, you will then Click on the "Go" button under the Approval Category. When the EPAF opens, review it to make sure you have the correct employee, Query Date and EPAF Approval Category. If you do not, you can select "Return to EPAF Menu" link to go back and try again


4. Enter the Position Control Number (PCN): For Board Appointed positions, the PCN will be given to you on the PeopleAdmin or contact your AAC if you do not have. For Temporary Help, we have designated PCNs that must be used according to the job type worked by the employee (see supplemental material)


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 PCN for the correct job. Most Original Appointments, Reappointments, Continuation EPAFs only have two sections, the Appointment and the Labor Distribution. In these cases, it's OK to select the "Go" button once you have selected the correct PCN

ID: Brad Pitt, V90000582
Query Date: Apr 04, 2012
Approval Category: Classified-Original Appnmt, CPPOAT

Classified, Permanent, Original Appointment, AOC12

Search Type	Position	Suffix	Title	Time Sheet	Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job									

 **There are no active jobs based on the Query Date.**



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.

For those EPAFs that have multiple sections, you'll need to select the Next Approval Type button multiple times. For example, a Temp Help EPAF will have the Original Appointment, Labor Distribution and TH-Termination of Job section (for an embedded future-date to terminate the job); as you select the Next Approval Type button, it will change to **Labor Distribution, MB** and then again to **TH-Termination of Job**. Re-enter the same PCN and suffix as before, check the "Select" button, and click the Go button. You want to make sure that when you have the data to enter in the EPAF that you have the correct PCN throughout the sections of the EPAF.

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 enterable)" next to it, then Banner has already flooded in the correct information and it cannot be changed.

5.1 Dates: Enter the dates for your EPAF using the correct format (**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 pay period 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 / Home 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*

5.11 ACA Indicator (Yes = Y or No = N): This code is for Affordable Care Act (ACA) Eligibility. The University is required to offer medical insurance for non-benefit eligible employee who meet certain criteria. **Please refer to the EPAF Training Supplemental Material.** If employee has any questions about their eligibility, have them contact **Benefit Services** at 885 – 3100 or e-mail benefits@uidaho.edu

- For benefit eligible Board Appointed positions (classified, exempt, postdoc fellow and faculty) and Temp Help non-PERSI positions (T4/ST and Work Study), the field is set as ‘N’= No.
- For TH PERSI positions (T1) and non-benefit eligible faculty positions (F4, F9), the field is blank to select either ‘Y’ = Yes or ‘N’ = No.

6. Enter the Labor Distribution (Index): The next section of the EPAF defines what budget from which the compensation will be expensed. The Index is often defaulted from the Position Budget within Banner. You may need to change the Index for this EPAF. Make sure that you have added (or removed) the Index numbers, that the total Percent adds to 100% and that your Labor Distribution section is completed before submitting your EPAF. The Account Code (E code) is an expense number used to differentiate between salary types.

To determine which Account Code to use, refer to the EPAF supplemental material. REMEMBER, although this information floods in, it may not be correct! Double check everything!

COA	Index	Fund	Orgn	Account	Program	Activity	Location	Project	Cost	Percent
V	644998	100000	644	E4106	07GAX	644EMP				100.00

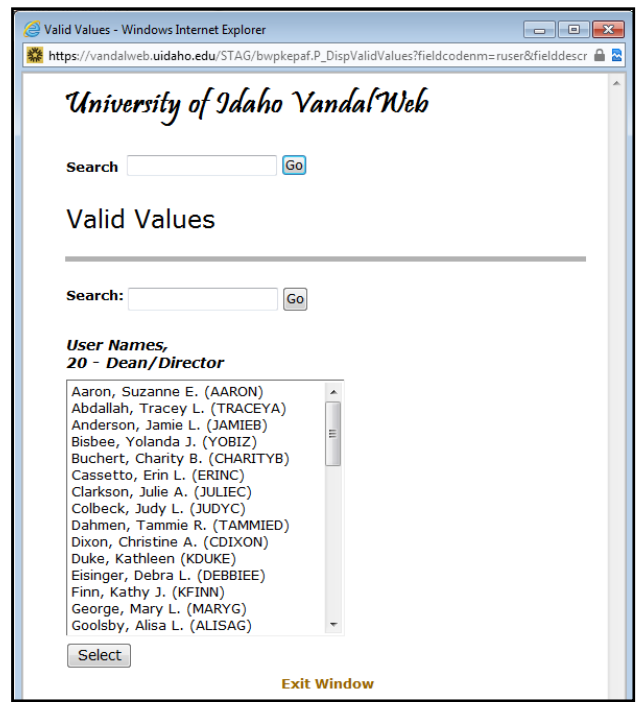
7. Save the Information: It would be a good time to save all the information you just entered. Find one of the Save buttons on the screen and click it. Watch for the six-digit Transaction number and Transaction Status at the top of the screen

8. Routing Queue: The Routing Queue for EPAF has a pre-designed list of approver levels. Select the correct approver for each level. Clicking on the magnifying glass will open a window displaying a list of all available options for that approver level.

Approval Level	User Name
20 - (DNDIR) Dean/Director	
90 - (HRSTES) Human Resources-STES	
Not Selected	
Not Selected	
Not Selected	
Not Selected	

Save and Add New Rows

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



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 first name & phone number so you may be contacted if there are any questions
- 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
- Indicate the Hiring method, open search through PeopleAdmin or a search waiver. PeopleAdmin Action Number should be included in the comments.
- If using **E4105** and **E4107** account codes, please leave the **exact dollar amounts**. This is required by the Provost Office to match the contract and the Budget Office needs to budget these amounts (within NBAPBUD). Giving percentages does NOT always equate to what the exact dollar amount is). If this info is missing, your EPAF could be returned for clarifying comments
- If using E4106 and E4140 account codes, please leave the **exact dollar amounts** so the Budget Office can properly budget the position in **NBAPBUD**. This is for those that have a work schedule salary differential
- RPR—Retroactive Pay Request (late pay added to the next paycheck); this requires an RPR form and may require a manual timesheet – contact Payroll at payroll@uidaho.edu for questions
- Special Check request (late pay that cannot use RPR); this requires a Special Check Request form and **fee** – contact Payroll at payroll@uidaho.edu for questions
- Make comments regarding terminated employee leave payoff / transfers to ensure that leave is handled correctly. It is assumed that leave will be paid out with their last paycheck automatically unless otherwise stated in the comments. Be sure to **include termination date**
- Keep all comments precise and brief, refrain from using inflammatory and inappropriate statements

10. 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.