



EPAF

Electronic Personnel Action Forms

What is EPAF?

On-line form for student hourly and salary jobs

Use EPAF to...

- Set up a student hourly or salary job –
 - Work study (hourly)
 - Non-work study (hourly and salary)
 - Job for international student (hourly and salary)
 - TAs and GAs (TA9999 & GA9999 positions)
- Change the rate of pay on a student hourly job
- Change the Time Sheet Org on a student hourly or salary job
- Change the FOAP on a student hourly or salary job
- Term a student hourly or salary job (change the job ending date)

Do not use EPAF for...

- Temporary positions--University Aides and Technical Professionals
 - TH9999 & TS9999 positions; contact Human Resources for these jobs
- Involuntary termination of student hourly, salary or work study position
 - Please contact Payroll for any involuntary termination of a student employee

How does EPAF work?

- Student job details are entered in EPAF
- EPAF uploads job information to Banner system
 - New job is set up in Banner system or
 - Change made to existing job (pay rate, etc.)
 - Student hourly time sheet is created
 - Student salary amounts can be entered using Banner PHATIME screen

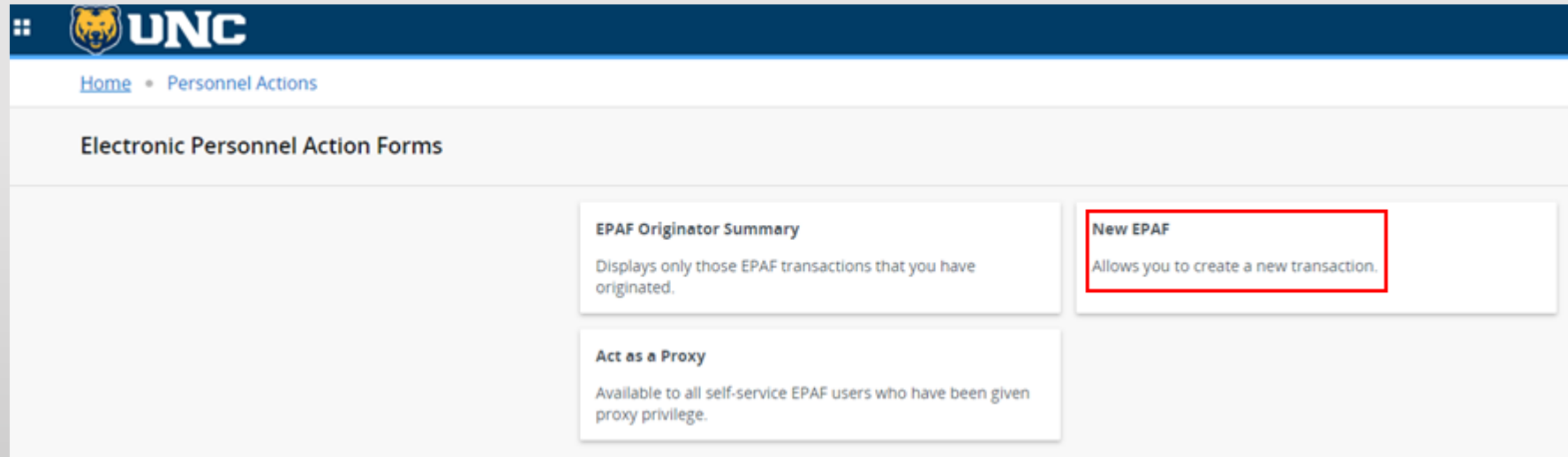
Accessing EPAF:

1. Log into Ursa
2. Click on the Employee Tab
3. Click on Employee Dashboard
4. Click on the link for Electronic Personnel Action Forms (EPAF)

The screenshot displays the Ursa system interface for the University of Northern Colorado. The top navigation bar includes the university logo and links for CAMPUS RESOURCES, HELP, OFFICES, CAMPUS SAFETY, FOR YOU, and LOGOUT. Below this, a secondary navigation bar features tabs for My Account, Student, Financial, and Employee, with the Employee tab highlighted in yellow and enclosed in a red box. The main content area is divided into two sections: Faculty & Advisor Tools and Employee Tools. The Faculty & Advisor Tools section contains two columns of links: Grades (Final Grades, Canvas-to-Banner GradeSync, Incomplete Grade Summary, Degree Works, Transfer Equivalency Report (ACC100), Undergraduate Course Repeat and Grade Replacement, Graduate Course Repeat and Grade Replacement, Submitting Final Grades, Grade Change Request Form) and Classes (Order Textbooks, Lock Up Classes, Important Dates for Your Courses, Registration Overrides, Faculty Detail Schedule, Class Roster, Active Assignments, Walk at a Glance, Student Schedule, Advisee Listing, Advisee Search, Grad School Forms). The Employee Tools section includes Employee Important Links (Test Banner Admin Pages), General Information (Curriculum Strategy), and Employee Information (Employee Dashboard, which is highlighted with a red box). On the right side, the My Activities section contains buttons for Enter Time, Enter Leave Report, and Request Time Off, followed by a list of activities: Approve Time, Approve Leave Report, Approve Leave Request, and Electronic Personnel Action Forms (EPAF), with the EPAF link highlighted by a red box.

5. Click on New EPAF

All EPAFs start with New EPAF



UNC

[Home](#) • [Personnel Actions](#)

Electronic Personnel Action Forms

EPAF Originator Summary
Displays only those EPAF transactions that you have originated.

New EPAF
Allows you to create a new transaction.

Act as a Proxy
Available to all self-service EPAF users who have been given proxy privilege.

New EPAF Person Selection:

- The first steps for all EPAFs:
 - Enter the student Bear ID, enter the start date of job (either the 1st or the 16th); and select an Approval Category

New EPAF Person Selection

Check the box to limit to search an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

First Name Last Name Is an employee or ID or SSN/SIN/TIN

Enter or Generate New ID

* indicates a required field. Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

ID *

[Generate new ID](#)

Query Date *

Approval Category *

1. Student Bear ID

2. Query (effective) date of EPAF

3. Select Approval Category

Student's Bear ID:

1. In the ID field, type in the student's Bear ID and press the Tab key
 - Student's name will populate

*Do not search for their Bear ID here; you need to "KNOW" their ID before you start an EPAF

New EPAF Person Selection

Check the box to limit to search an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

First Name Last Name Is an employee or ID or SSN/SIN/TIN

Enter or Generate New ID

* Indicates a required field. Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

ID *

EPAF Query (effective) Date

2. The Query (effective) Date defaults to Today's date
 - Change the Query (effective) date as follows:

New EPAF Person Selection

Check the box to limit to search an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

First Name Last Name Is an employee or ID or SSN/SIN/TIN

Enter or Generate New ID

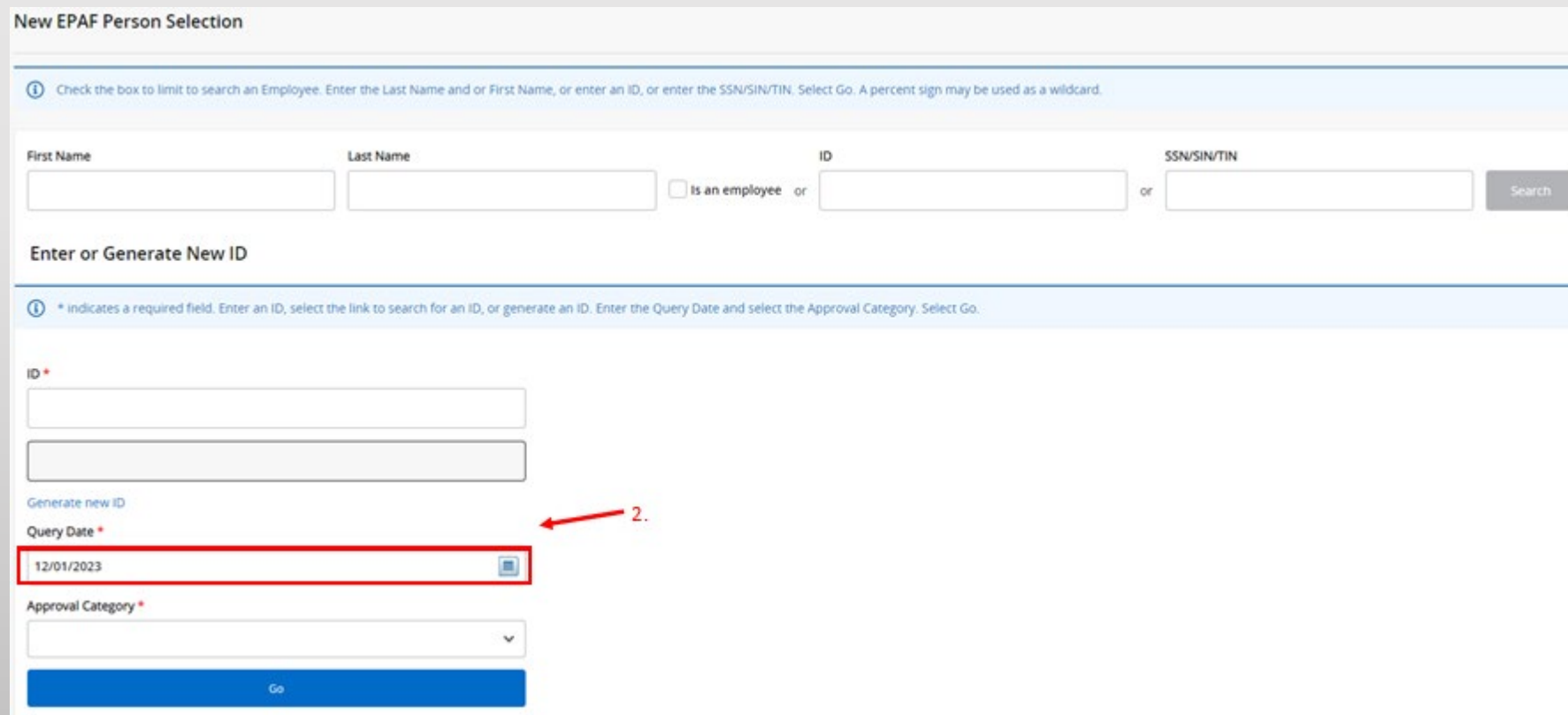
* indicates a required field. Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

ID *

Generate new ID [Generate new ID](#)

Query Date *

Approval Category *



Change Today's date to:

- For new jobs, use the first day of the work period during which the student begins work; either the 1st or the 16th.
- The Query (effective) Date becomes the starting date for the hourly time sheet.
- For pay rate changes, FOAP changes, etc., use the first day of the pay period; the 1st or the 16th.
- When terming a job, use the last day of the work period during which the student stops work; the 15th or the last day of the month.

Helpful hints for the Query (effective) Date:

- For new jobs, make sure the job start date includes the first day of work. This may need to be a prior pay period; still using the 1st or the 16th.
- If terming or changing an existing job, check the Last Paid Date.
 - Changes to existing jobs must be dated after the Last Paid Date
 - The new ending date must be equal to or after the Last Paid Date

*Check the employee's time sheet! If there are hours in the current work period, use the last day of the current work period as the job ending date.

EPAF Approval Category

3. The Approval Category is the type of EPAF - or job action
 - Click the Drop Down arrow to see the list of Approval Categories

New EPAF Person Selection

Check the box to limit to search an Employee. Enter the Last Name and/or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

First Name Last Name Is an employee or ID or SSN/SIN/TIN

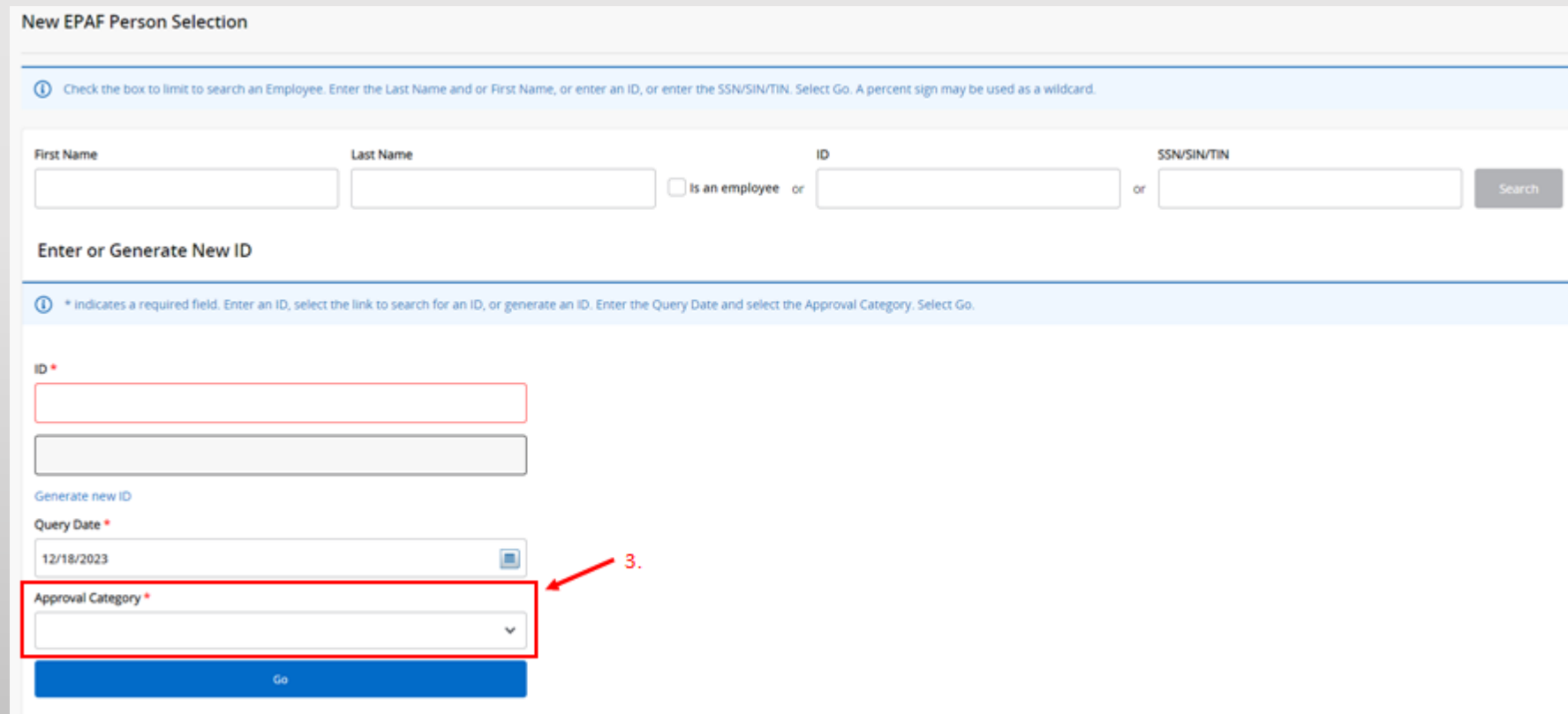
Enter or Generate New ID

* indicates a required field. Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

ID *

Query Date *

Approval Category *

A screenshot of a web form titled "New EPAF Person Selection". The form has a light blue header with a search instruction: "Check the box to limit to search an Employee. Enter the Last Name and/or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard." Below this are input fields for "First Name", "Last Name", "Is an employee" (checkbox), "ID", and "SSN/SIN/TIN", followed by a "Search" button. A section titled "Enter or Generate New ID" contains a red-bordered "ID *" field, a "Generate new ID" button, a "Query Date *" field with the value "12/18/2023" and a calendar icon, and a red-bordered "Approval Category *" dropdown menu. A red arrow labeled "3." points to the dropdown menu. At the bottom is a blue "Go" button.

Select the Approval Category

Change FOAP and/or Labor Dist. Percentage, FOAP
Change Pay Rate for any hourly worker, CHGPAY
Change Timesheet Org, TSORG
Hire New Student Hrly Empl never before worked @ UNC, SH001
Add Another Student Hrly Job record for current employee, SH002
Studnt Hrly, Reactivate existing job record w/prior term row, SH004
Hire New Student Salary Empl never before worked @ UNC, SS001
Add Another Student Salary Job record for current employee, SS002
Studnt Sal., Reactivate existing job record w/prior term row, SS004
Terminate job record for EE no longer working, TERMJB
TAGA Create NEW EMPLOYEE Record--NBAJOBS, TG001
TAGA Create ADDITIONAL JOB RECORD--NBAJOBS, TG002
TAGA Reuse REACTIVATE EXISTING JOB RECORD, TG003

After you select an Approval Category...

- Once you select the Approval Category, a list of **active** jobs for the student is returned.
- For a new hire, there should not be any jobs listed.
- Click the **All Jobs** button to see the complete job history for the student, both active and termed jobs.
- Review the student's job history.

Evaluate the Approval Category:

- Have I selected the Approval Category I need?
- Review the student's job history.
- If there is **NO** job history, the student is considered a new hire. Make sure you have selected one of the categories for a new hire.
 - Hire New Student Hrly Empl never before worked @ UNC, SH001
 - Hire New Student Sarlay Empl never before worked @ UNC, SS001

Evaluate the Approval Category:

- If there **IS** job history, the student is not a new hire. Make sure you have selected one of the categories for a student who is working or who has worked in the past.
 - Add another Student Hrly Job record for current employee, SH002
or
 - Student Hrly, Reactivate existing job record w/ prior term row, SH004
 - Add another Student Salary Job record for current employee, SS002
or
 - Student Sal., Reactivate existing job record w/ prior term row, SS004
- How do I know if I need to **Add** a job or **Reactivate** a job?
- What does it mean to **Reactivate** a job?

What is reactivating a job?

- Reactivating a job is “re-using” a job by adding new dates and job details to a previously termed job.
- Why choose this option?
 - Keeps student job history to a minimum.
- When reactivating, look at job number and suffix.
 - Make sure the job you select to reactivate is the job number and suffix type (academic year or summer) as the job you will set up.

Do I Add a job or Reactivate a job?

- You will **Add** a job when the job “type” you are hiring a student for does not appear in the student’s job history.
 - **Example:** You are hiring a student in a federal work study job and the student’s job history shows they have a non-work study hourly job but no federal work study job(s). You will **Add** your job as a new federal work study job.
 - **Example:** You are hiring a student in a semester salary job and the student’s job history does not show any academic year salary jobs. You will **Add** your job as a new student salary job.

Do I Add a job or Reactivate a job?

- You will **Add** a job when the student's job history shows there is an Active job of the same "type" of job you are setting up.
 - **Example:** You are hiring a student in a state work study job and the student's job history shows an Active state work study job in another department on campus. You will **Add** your job as an additional state work study job.
 - **Example:** You are hiring a student in a summer salary job and the student's job history shows a current summer salary job in another department on campus. You will **Add** your job as an additional summer salary job.

Choose to Reactivate a job when:

- You will **Reactivate** a job when the job “type” you are setting up matches a previous (termed status) job in student’s job history.
- **Example:** If you are setting up a student hourly job (position SH9999), you can reactivate a previously termed student hourly job (SH9999). Do not choose another position number to reactivate.
- **Example:** If you are setting up a student salary job (position SS9999), you can reactivate a previously termed student salary job (SS9999). Do not choose another position number to reactivate.

Choose to Reactivate a job when:

- **Example:** If you are setting up a state work study job (position SH9997), you can reactivate a previously termed state work study hourly job (SH9997). Do not choose a federal work study hourly job to reactivate.
- **Example:** If you are setting up a summer job (summer suffixes begin with the letter “S” - S0, S1, etc.), you can reactivate a previously termed summer job (job with a summer suffix). Do not choose a job with an academic year suffix (00, 01, etc.)

Select a new Approval Category if needed!

- After reviewing the job history, you can select a new Approval Category if needed.
- Once you select a **new** Approval Category, a list of **active** jobs for the student is again returned.
- Click the **All Jobs** button to see the complete job history for the student.
- Use the Radio Button to select the job you need if you are reactivating or making a change to an existing job.

Student Job Numbers:

- **Student Hourly: SHxxxx**

- **SH9999** Student hourly job, non-work study
- **SH9996** International student hourly job
- **SH9997** State work study hourly job
- **SH9998** Federal work study hourly job
 - Use capital letters **SH**

- **Student Salary: SSxxxx**

- **SS9999** Student salary job – non-international student
- **SS9996** International student hourly job
 - Use capital letters **SS**

Suffixes for Student Jobs:

- The suffix is attached to the job number and distinguishes one job from another.
- Each job has its own suffix.
- Academic year or semester job uses two numbers:
 - **00, 01, 02, 03, etc.**
- Summer job uses capital letter 'S' followed by a number:
 - **S0, S1, S2, S3, etc.**

Proceed with your EPAF:

- After you have verified the Approval Category, click the Go button to proceed with EPAF data entry

New EPAF Person Selection

Check the box to limit to search an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

First Name Last Name Is an employee or ID or SSN/SIN/TIN

Enter or Generate New ID

* indicates a required field. Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

ID *

Generate new ID

Query Date *

Approval Category *

EPAF Data Entry Fields:

- * Required fields are noted with a red asterisk
- * (Not Enterable) There is a default value. No data entry is possible

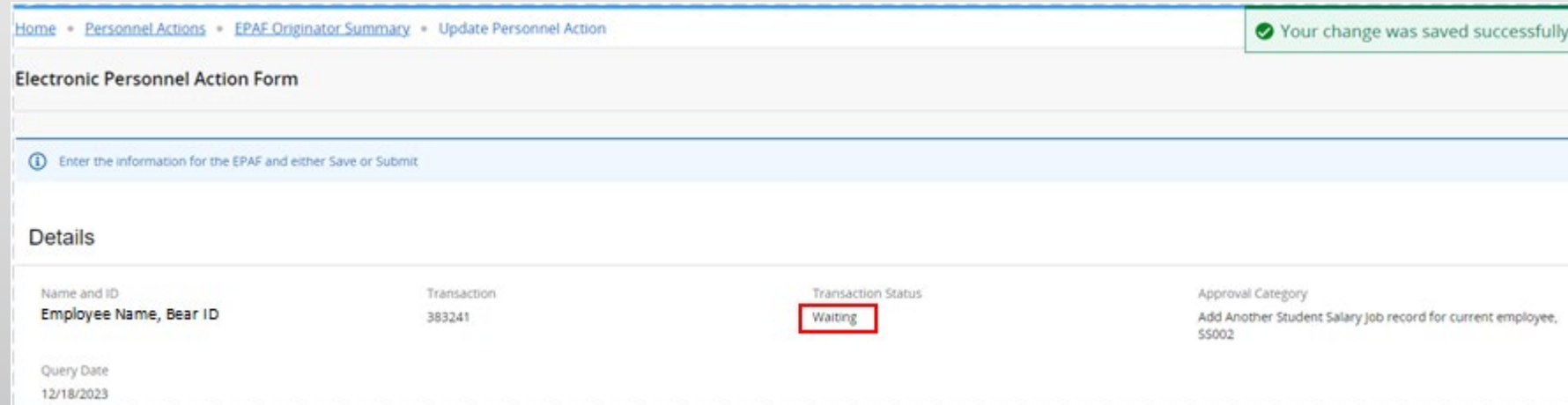
EPAF Data Entry:

- There are step-by-step guides for EACH type of EPAF available on the payroll website.
- Additional resources for EPAF data entry, available on the payroll website:
 - User Guide for Student EPAFs
 - Setting up Default Routing Queues
 - EPAF Error Messages
- For immediate assistance with an EPAF, contact:
 - Student Employment at 351-2628 or
 - Payroll at 351-2705

Save your EPAF:

After entering EPAF job details, click the Save button at the bottom of the EPAF.

- Look for a green check mark at the top of the EPAF.
- The Transaction Status of your EPAF will be “Waiting” and it will be assigned a unique transaction number.



The screenshot displays the 'Electronic Personnel Action Form' interface. At the top right, a green notification box states 'Your change was saved successfully.' The breadcrumb trail includes 'Home', 'Personnel Actions', 'EPAF Originator Summary', and 'Update Personnel Action'. Below the title, a light blue bar contains an information icon and the text 'Enter the information for the EPAF and either Save or Submit'. The 'Details' section contains a table with the following data:

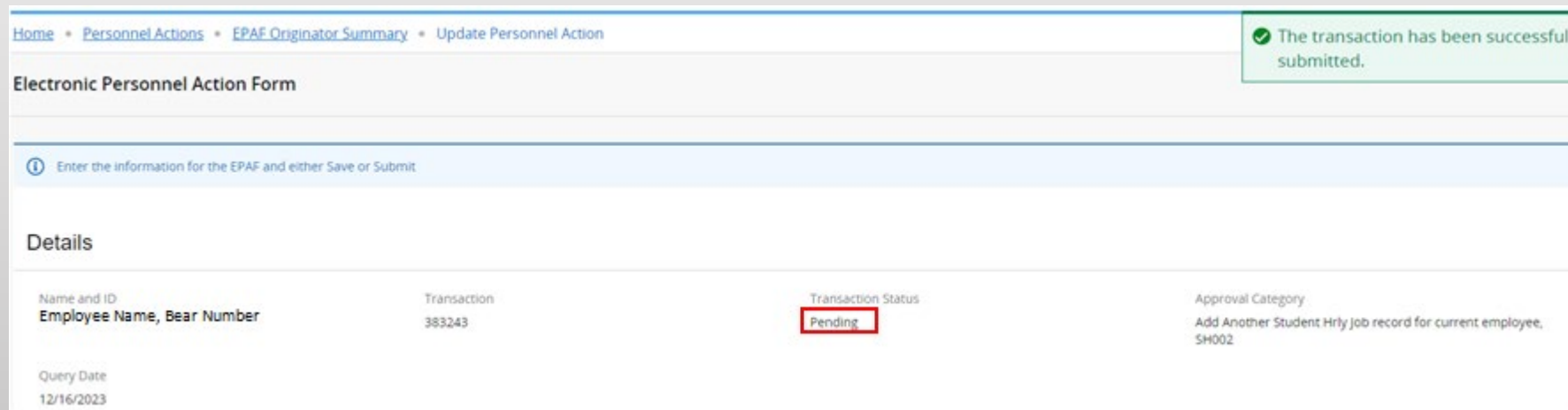
Name and ID	Transaction	Transaction Status	Approval Category
Employee Name, Bear ID	383241	Waiting	Add Another Student Salary Job record for current employee, S5002

At the bottom left, the 'Query Date' is listed as 12/18/2023.

Submit your EPAF:

After saving your EPAF, click the Submit button at the bottom of the EPAF.

- Look for a green check mark at the top of the EPAF.
- The Transaction Status of your EPAF will be “Pending”.
- “Pending” means that your EPAF has been forwarded to Student Employment for approval.



Home • Personnel Actions • EPAF Originator Summary • Update Personnel Action

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit

Details

Name and ID Employee Name, Bear Number	Transaction 383243	Transaction Status Pending	Approval Category Add Another Student Hrly job record for current employee, SH002
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Query Date
12/16/2023

The transaction has been successfully submitted.

What happens next?

- Warning messages may appear. These are OK and no action is needed.
- After you submit your EPAF successfully, it will be reviewed by Student Employment.
- This process generally takes 24 hours.
- Your EPAF will be approved -- or it may be returned for correction.
- You must monitor and check the status of all of your EPAFs – Student Employment/Payroll will send you an EPAF correction email, if needed.
- Use the EPAF Originator Summary to track your EPAFs.
- Check NBIJLIST the next day to see if the job is set up.

NOTE: If error messages appear, you will need to correct the errors before your EPAF can be processed.

EPAF Originator Summary

Electronic Personnel Action Forms

EPAF Originator Summary

Displays only those EPAF transactions that you have originated.

New EPAF

Allows you to create a new transaction.

Act as a Proxy

Available to all self-service EPAF users who have been given proxy privilege.



EPAF Originator Summary

- There are two tabs: **Current** and **History**.
- Check the **Current** Tab and the **History** Tab under the **EPAF Originator Summary** to find the status of your EPAF.
- It is recommended that you review the **EPAF Originator Summary** daily until the status of your EPAF changes to **Completed**.
- When the EPAF status is **Completed**, the job (or job action) has been uploaded successfully to the Banner system.

Current Tab


- The **Current** Tab lists EPAFs that are in process, at a **Waiting** or **Returned for Correction** status.

EPAF Originator Summary

[Current](#) [History](#)

Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

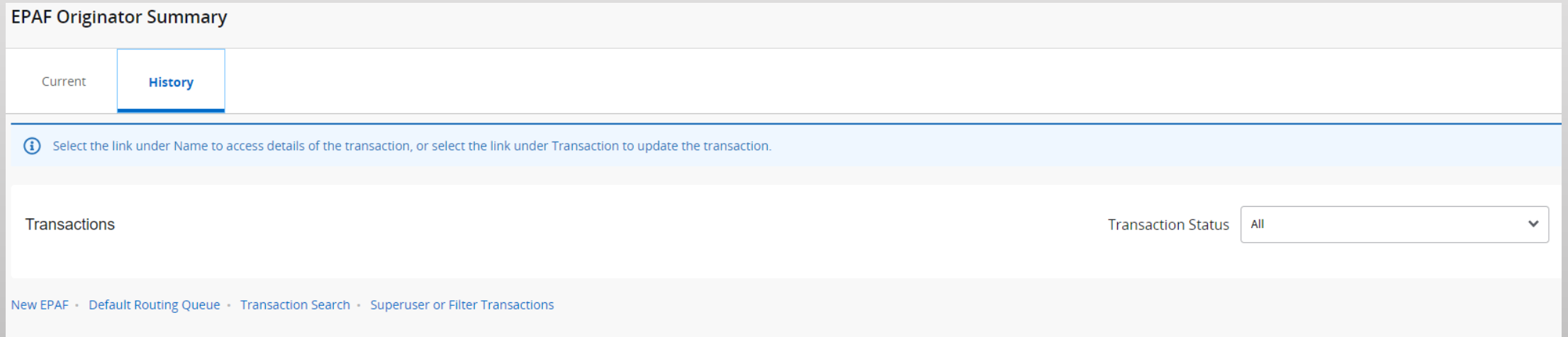
Transactions Transaction Status:

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Status	Links
Last Name, First Name Student Wages Non-Work Study, SH9999-01	Bear Number	383241	Add Another Student Salary Job record for current employee		12/18/2023	Waiting	

History Tab

- The **History** Tab lists EPAFs that have been successfully submitted. These EPAFs are at a **Pending** or **Completed** status.
- EPAFs that have been Voided or Cancelled also appear under the **History** Tab.

***Note: Never cancel an EPAF!**



The screenshot displays the 'EPAF Originator Summary' page. At the top, there are two tabs: 'Current' and 'History', with 'History' being the active tab. Below the tabs is a light blue informational banner with an information icon and the text: 'Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.' Underneath this banner is a section titled 'Transactions'. To the right of this section is a 'Transaction Status' dropdown menu currently set to 'All'. At the bottom of the page, there is a breadcrumb trail: 'New EPAF · Default Routing Queue · Transaction Search · Superuser or Filter Transactions'.

When your EPAF is approved:

- The status of the EPAF will change from “Pending” to “Approved.”
- Once the EPAF is approved, the job will be uploaded to Banner within 24 hours.
- When that status of your EPAF is “Completed,” the new job or job action has been uploaded to Banner.
- Hourly time sheet is created when EPAF is “Completed”.
- You can verify the EPAF was completed and the job set up by going to NBIJLST, the next day.

If your EPAF is returned for correction:

- The status will be changed from “Pending” to “Returned for Correction.”
- A comment will be added with information on how to correct your EPAF.
- The job will not automatically be uploaded to Banner until corrections are made and the EPAF is re-submitted.
- Review the comment added to your EPAF.
- Use the **Update** button to open and update the EPAF and make the necessary corrections. Then, **Save** and **Submit** the revised EPAF.

Contacts for EPAF Assistance and Information:

- Payroll Department, 351-2705
- Student Employment Department, 351-2628
- For immediate assistance with an EPAF, contact Jeanette Miller at 351-2705 or the Payroll Office at 351-2700.