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Student EPAF Instructions

New Hire - Non-Work Study Student Hourly Job

Listed below are Job Details and EPAF Steps to set up a non-work study hourly job for a student who has not worked for UNC (has no job history.)

Job Details:

Employee Class Code:	SW	Student Wages (non-work study hourly)
Job Number:	SH9996 SH9999	International student hourly Student hourly, non-work study
Job Suffix:	00 S0	Academic year and semester jobs (two zeros) Summer jobs (S-zero)
I-9 Date:	Date on Page 2 of the I-9 form	
Home Organization:	The Organization code for the hiring department or where the employee is located	
Distribution Orgn:	Same as the Home Organization	
Timesheet Orgn:	The Organization code where the employee's time sheet is to be routed for approval	
Hourly Rate of Pay:	Must be at least minimum wage but no more than \$15/hour	
Job Starting Date:	The first day of the work period that includes the employee's first day of work (PREFERRED) or the actual date the employee begins work.	
	No earlier than August 16 th for academic year and semester hourly jobs	
	No earlier than May 16 th for summer hourly jobs	
Job Ending Date:	The last day of the work period that includes the employee's last day of work	
	No later than May 15 th for academic year and semester hourly jobs	
	No later than August 15 th for summer hourly jobs	

FOAP: Fund, Organization, Account (see below), Program and optional Activity codes for wage expense

Account Code:	64110	Academic year and semester jobs
	64115	Summer jobs

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.
4. The **Effective Date** defaults to Today's Date. Change the date to the job begin date; date must be in **MM/DD/YYYY** format.
5. Select the Approval Category: **Hire New Student Hrly Empl never before worked @ UNC, SH001**.
6. Screen will display any Active jobs for the student. **There should be no Active jobs for a new hire.**
7. Click the **All Jobs** button.
8. Screen will display complete job history. **For a new hire there should not be job history.**
9. If there is job history, select a different **Approval Category** to **add** an hourly job or to **reactivate** an hourly job. (To make this change, click on **Return to EPAF Menu**, then **New EPAF** and select the new **Approval Category**.)
10. Click the **Go** button.
11. Screen returns with the fields for a **New Job**.
12. Type the Position number and Suffix in the **Position** and **Suffix** fields:
Position: SH9996 or SH9999
Suffix: 00 for academic year or semester: S0 for summer
13. Click the **Go** button.
14. Complete the EPAF fields as noted below.
15. **Employee Class Code: SW** (Student Wages). Type in the code or use the magnifying glass to select the code from the list of values. (SW is near the bottom of the list.)
16. **Home Organization:** The Organization code for the hiring department. Type in the code or use the magnifying glass to select the code.
17. **Distribution Orgn:** Same as the Home Organization.
18. **I9 Date:** Type in the date from page 2 of the I-9 form; date must be in **MM/DD/YYYY** format.
19. **I9 Form Indicator:** Select **Received** from the drop down list. If I-9 is not received, add a Comment to your EPAF or contact Student Employment at 1-2628 for assistance.
20. **Regular Rate:** Type in the hourly rate of pay.
21. **Timesheet Orgn:** The Organization code for time sheet approval. Type in the code or use the magnifying glass to select the code.

22. **FOAP Fields:** Default values will appear. **Type over the default values with your FOAP for wage expense.**

Effective Date = Defaults from the EPAF Effective Date. **Do not change this date.**

COA = Q; do not change this value

Index = Not used; leave blank

Fund = Fund code; if the Fund includes a letter, use a capital letter

Organization = Organization code

Account = Account code:

64110 for academic year or semester jobs

64115 for summer jobs

Program = Program code

Activity = Activity code; optional; use capital letter(s) if part of code

Location, Project, Cost = Not used; leave blank

Percent = 100.00 % (or change if adding additional FOAP lines as noted below)

23. Additional FOAP lines can be added if needed (up to a total of 5 lines). The **COA** field must be completed for each line; change the **Percent** on each line so that the total is 100% for all lines.

24. **Jobs Effective Date:** This is the job ending date. Date must be in **MM/DD/YYYY** format.

25. **Personnel Date:** Type in the same job ending date (the job ending date is typed in both fields.)

26. Verify **Routing Queue, User Name** fields (second column) contain required default values:

First line, User Name Column = **STUDENTHIRE_APPROVE**

Second line, User Name Column = **HR_APPLIER**

27. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.

28. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.

29. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.

30. It will take approximately 24 hours for the job to upload to Banner.

31. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ Warning messages may appear and do not need follow-up action.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Contact the Payroll office at 1-2705 or Student Employment at 1-2628 for assistance.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: Effective Date: Dec 01, 2016
Transaction:
Transaction Status:
Approval Category: Hire New Student Hrlr Empl never before worked @ UNC, SH001

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* - Indicates a required field.

New Student EE no prior job at UNC 2

Item	Current Value	New Value
Employee Status: (Not Enterable)		A
Employee Class Code: *		<input type="text"/>
Home COAS: (Not Enterable)		Q
Home Organization: *		<input type="text"/>
Distribution Orgn: *		<input type="text"/>
Original Hire Date: MM/DD/YYYY *		12/01/2016
Current Hire Date: MM/DD/YYYY *		12/01/2016
I9 Date: MM/DD/YYYY *		<input type="text"/>
I9 Form Indicator: *		Not Selected
Term Reason Code: (Not Enterable)		
Termination Date: MM/DD/YYYY (Not Enterable)		

Add an Additional Job for Student Hourly 2, SH9999-00 Student Wages Non-Work Study

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY *		12/01/2016
Jobs Effective Date: MM/DD/YYYY *		12/01/2016
Contract Type: (Not Enterable)		P
Job Status: (Not Enterable)		A
Job Change Reason: (Not Enterable)		NHIRE
Step: (Not Enterable)		0
Regular Rate: *		<input type="text"/>
Factor: (Not Enterable)		24
Pays: (Not Enterable)		24
Timesheet Orgn: *		<input type="text"/>
Workers Comp Code: (Not Enterable)		01

FOAP/Percentage change on a new/reactivate job, SH9999-00 Student Wages Non-Work Study

Current
Effective Date: 12/01/2016
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New Effective Date: MM/DD/YYYY 12/01/2016											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total:										100.00	

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End/Terminate Job Record, SH9999-00 Student Wages Non-Work Study

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY *		<input type="text"/>
Personnel Date: MM/DD/YYYY *		<input type="text"/>
Job Status: (Not Enterable)		T
Job Change Reason: (Not Enterable)		EJ

Routing Queue

Approval Level	User Name	Required Action
B4 - (SEAPRV) Student Employment APPROV	STUDENTHIRE_APPROVE	Studenthire Approve
94 - (HRAPLY) HR Apply	HR_APPLIER	HR Applier
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Comment

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Student EPAF Instructions

New Hire - Federal Work Study Student Hourly Job

Listed below are Job Details and EPAF Steps to set up a federal work study hourly job for a student who has not worked for UNC (has no job history.)

Job Details:

Employee Class Code:	WS	Student Work Study
Job Number:	SH9998	Federal work study hourly
Job Suffix:	00	Academic year and semester jobs (two zeros)
I-9 Date:	Date on Page 2 of the I-9 form	
Home Organization:	The Organization code for the hiring department or where the employee is located	
Distribution Orgn:	The same as the Home Organization	
Timesheet Orgn:	The Organization code where the employee's time sheet is to be routed for approval	
Hourly Rate of Pay:	Must be at least minimum wage but no more than \$15/hour	
Job Starting Date:	The first day of the work period that includes the employee's first day of work (PREFERRED) or the actual date the employee begins work. No earlier than August 16 th for academic year and semester jobs	
Job Ending Date:	The last day of the work period that includes the employee's last day of work No later than May 15 th for academic year and semester jobs	
FOAP:	Fund, Organization, Account (see below), Program and optional Activity codes for wage expense	
Account Code:	64410 Federal work study jobs	

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.
4. The **Effective Date** defaults to Today's Date. Change the date to the job begin date; date must be in **MM/DD/YYYY** format.
5. Select the Approval Category: **Hire New Student Hrly Empl never before worked @ UNC, SH001**.
6. Screen will display any Active jobs for the student. **There should be no Active jobs for a new hire.**
7. Click the **All Jobs** button.
8. Screen will display complete job history. **For a new hire there should not be job history.**
9. If there is job history, select a different **Approval Category** to **add** an hourly job or to **reactivate** an hourly job. (To make this change, click on **Return to EPAF Menu**, then **New EPAF** and select the new **Approval Category**.)
10. Click the **Go** button.
11. Screen returns with the fields for a **New Job**.
12. Type the Position number and Suffix in the **Position** and **Suffix** fields:
Position: SH9998 Suffix: 00 (2 zeros)
13. Click the **Go** button.
14. Complete the EPAF fields as noted below.
15. **Employee Class Code: WS** (Student Work Study). Type in the code or use the magnifying glass to select the code from the list of values. (WS is the last one in the list.)
16. **Home Organization:** The Organization code for the hiring department. Type in the code or use the magnifying glass to select the code.
17. **Distribution Orgn:** Same as the Home Organization.
18. **I9 Date:** Type in the date from page 2 of the I-9 form; date must be in **MM/DD/YYYY** format.
19. **I9 Form Indicator:** Select **Received** from the drop down list. If I-9 is not received, add a Comment to your EPAF or contact Student Employment at 1-2628 for assistance.
20. **Regular Rate:** Type in the hourly rate of pay.
21. **Timesheet Orgn:** The Organization code for time sheet approval. Type in the code or use the magnifying glass to select the code.
22. **FOAP Fields:** Default values will appear on 2 FOAP lines. Federal work study wage expense is split between the hiring department (25%) and work study funds (75%).

23. Type over the default values on the non-work study FOAP line with the **department FOAP for wage expense**.

Effective Date = Defaults from the EPAF Effective Date. **Do not change this date.**
COA = Q; do not change this value
Index = Not used; leave blank
Fund = Fund code; if the Fund includes a letter, use a capital letter
Organization = Organization code
Account = **64410**
Program = Program code
Activity = Activity code; optional; use capital letter(s) if part of code
Location, Project, Cost = Not used; leave blank
Percent = 25.00 %

24. Default values will appear on the work study FOAP line. **Change the Organization code from the default value 32230 to your department Organization code.**

COA = Q
Index = Not used; blank
Fund = **Current Federal Work Study Fund** (the Fund number changes every year)
Organization = **Department Organization code**
Account = 64410
Program = 5000
Activity = Not used; blank
Location, Project, Cost = Not used; blank
Percent = 75.00 %

25. Additional FOAP lines can be added for department wage expense only, if needed (up to a total of 4 department lines.) The **COA** field must be completed for each line; change the **Percent** on each department line so that the total department wage expense remains at 25%.
26. **Jobs Effective Date:** This is the job ending date. Date must be in **MM/DD/YYYY** format.
27. **Personnel Date:** Type in the same job ending date (the job ending date is typed in both fields.)
28. Verify **Routing Queue, User Name** fields (second column) contain required default values:
- First line, User Name Column = **STUDENTHIRE_APPROVE**
Second line, User Name Column = **HR_APPLIER**
29. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.
30. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.
31. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.
32. It will take approximately 24 hours for the job to upload to Banner.
33. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ Warning messages may appear and do not need follow-up action.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Contact the Payroll office at 1-2705 or Student Employment at 1-2628 for assistance.

Electronic Personnel Action Form

Enter the information for the EPAP and either Save or Submit.

Name and ID:
Transaction: Effective Date: Aug 16, 2017
Transaction Status:
Approval Category: Hire New Student Hrly Empl never before worked @ UNC, SH001

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• - Indicates a required field.

New Student EE no prior job at UNC 2

Item	Current Value	New Value
Employee Status: • (Not Enterable)		A
Employee Class Code: •		Q
Home COAS: • (Not Enterable)		Q
Home Organization: •		Q
Distribution Orgn: •		Q
Original Hire Date: MM/DD/YYYY •		08/16/2017
Current Hire Date: MM/DD/YYYY •		08/16/2017
19 Date: MM/DD/YYYY •		Not Selected
19 Form Indicator: •		Not Selected
Term Reason Code: • (Not Enterable)		-
Termination Date: MM/DD/YYYY • (Not Enterable)		-

Add an Additional Job for Student Hourly 2, SH9998-00 Federal Work Study

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY •		08/16/2017
Jobs Effective Date: MM/DD/YYYY •		08/16/2017
Contract Type: • (Not Enterable)		P
Job Status: • (Not Enterable)		A
Job Change Reason: • (Not Enterable)		NHIRE
Step: • (Not Enterable)		0
Regular Rate: •		
Factor: • (Not Enterable)		24
Pays: • (Not Enterable)		24
Timesheet Orgn: •		Q
Workers Comp Code: • (Not Enterable)		01

FOAP/Percentage change on a new/reactivate job, SH9998-00 Federal Work Study

Current
Effective Date: 08/16/2017
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
Q		39008	Q 32230	Q 64410	Q 5000	Q	Q			75.00		
Q		25215	Q 95152	Q 67999	Q 6000	Q	Q			25.00		
Q						Q	Q					
Q						Q	Q					
Q						Q	Q					
Q						Q	Q					
Total:										100.00		

Note: The Work Study fund number will change each year.

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End/Terminate Job Record, SH9998-00 Federal Work Study

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY •		
Personnel Date: MM/DD/YYYY •		
Job Status: • (Not Enterable)		T
Job Change Reason: (Not Enterable)		(E)

Routing Queue

Approval Level	User Name	Required Action
84 - (SEARV) Student Employment APPROV	STUDENTHIRE_APPROVE	Studenthire Approve
94 - (HRAV) HR Apply	HR_APPLIER	HR Applier
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Comment

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Student EPAF Instructions

New Hire - State Work Study Student Hourly Job

Listed below are Job Details and EPAF Steps to set up a state work study hourly job for a student who has not worked for UNC (has no job history.)

Job Details:

Employee Class Code:	WS	Student Work Study
Job Number:	SH9997	State work study hourly
Job Suffix:	00	Academic year and semester jobs (two zeros)
I-9 Date:	Date on Page 2 of the I-9 form	
Home Organization:	The Organization code for the hiring department or where the employee is located	
Distribution Orgn:	The same as the Home Organization	
Timesheet Orgn:	The Organization code where the employee's time sheet is to be routed for approval	
Hourly Rate of Pay:	Must be at least minimum wage but no more than \$15/hour	
Job Starting Date:	The first day of the work period that includes the employee's first day of work (PREFERRED) or the actual date the employee begins work.	
	No earlier than August 16 th for academic year and semester hourly jobs	
Job Ending Date:	The last day of the work period that includes the employee's last day of work	
	No later than May 15 th for academic year and semester hourly jobs	
FOAP:	Fund, Organization, Account (see below), Program and optional Activity codes for wage expense	
Account Code:	64510 State work study jobs	

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.
4. The **Effective Date** defaults to Today's Date. Change the date to the job begin date; date must be in **MM/DD/YYYY** format.
5. Select the Approval Category: **Hire New Student Hrly Empl never before worked @ UNC, SH001**.
6. Screen will display any Active jobs for the student. **There should be no Active jobs for a new hire.**
7. Click the **All Jobs** button.
8. Screen will display complete job history. **For a new hire there should not be job history.**
9. If there is job history, you will need to use the **Approval Category** to **add** an hourly job or to **reactivate** an hourly job. (To make this change, click on **Return to EPAF Menu**, then **New EPAF** and select the new **Approval Category**.)
10. Click the **Go** button.
11. Screen returns with the fields for a **New Job**.
12. Type the Position number and Suffix in the **Position** and **Suffix** fields:
Position: SH9997 Suffix: 00 (2 zeros)
13. Click the **Go** button.
14. Complete the EPAF fields as noted below.
15. **Employee Class Code: WS** (Student Work Study). Type in the code or use the magnifying glass and select the code from the list of values. (WS is the last one in the list.)
16. **Home Organization:** The Organization code for the hiring department. Type in the code or use the magnifying glass to select the code.
17. **Distribution Orgn:** Same as the Home Organization.
18. **I9 Date:** Type in the date from page 2 of the I-9 form; date must be in **MM/DD/YYYY** format.
19. **I9 Form Indicator:** Select **Received** from the drop down list. If I-9 is not received, add a Comment to your EPAF or contact Student Employment at 1-2628 for assistance.
20. **Regular Rate:** Type in the hourly rate of pay.
21. **Timesheet Orgn:** The Organization code for time sheet approval. Type in the code or use the magnifying glass to select the code.

22. **FOAP Fields:** Default values will appear as noted below. **Change the Organization code from the default value 32230 to your department Organization code.**

Effective Date = Defaults from the EPAF Effective Date. **Do not change this date.**
COA = Q
Index = Not used; blank
Fund = **Current State Work Study Fund** (the Fund number changes every year)
Organization = **Department Organization code**
Account = 64510
Program = 5000
Activity = Not used; blank
Location, Project, Cost = Not used; blank
Percent = 100.00 %

23. **Jobs Effective Date:** This is the job ending date. Date must be in **MM/DD/YYYY** format.
24. **Personnel Date:** Type in the same job ending date (the job ending date is typed in both fields.)
25. Verify **Routing Queue, User Name** fields (second column) contain required default values:
- First line, User Name Column = **STUDENTHIRE_APPROVE**
Second line, User Name Column = **HR_APPLIER**
26. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.
27. **Comment.** Required for state work study jobs. Type the FOAP (Fund, Organization, Account, Program and optional Activity codes) for departmental wage expense that is to be used in the event work study funds are depleted.
28. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.
29. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.
30. It will take approximately 24 hours for the job to upload to Banner.
31. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ Warning messages may appear and do not need follow-up action.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Contact the Payroll office at 1-2705 or Student Employment at 1-2628 for assistance.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: Effective Date: Aug 16, 2017
Transaction:
Transaction Status:
Approval Category: Hire New Student Hrly Empl never before worked @ UNC, SH001

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* - indicates a required field.

New Student EE no prior job at UNC 2

Item	Current Value	New Value
Employee Status: * (Not Enterable)		A
Employee Class Code: *		Q
Home COAS: * (Not Enterable)		Q
Home Organization: *		Q
Distribution Orgn: *		Q
Original Hire Date: MM/DD/YYYY *	08/16/2017	
Current Hire Date: MM/DD/YYYY *	08/16/2017	
I9 Date: MM/DD/YYYY *		
I9 Form Indicator: *		Not Selected
Term Reason Code: * (Not Enterable)		-
Termination Date: MM/DD/YYYY * (Not Enterable)		-

Add an Additional Job for Student Hourly 2, SH9997-00 Student Wages Work Study

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY *	08/16/2017	
Jobs Effective Date: MM/DD/YYYY *	08/16/2017	
Contract Type: * (Not Enterable)	P	
Job Status: * (Not Enterable)	A	
Job Change Reason: * (Not Enterable)	NHIRE	
Step: * (Not Enterable)	0	
Regular Rate: *		
Factor: * (Not Enterable)	24	
Pays: * (Not Enterable)	24	
Timesheet Orgn: *	Q	
Workers Comp Code: * (Not Enterable)	01	

FOAP/Percentage change on a new/reactivate job, SH9997-00 Student Wages Work Study

Current
Effective Date: 08/16/2017
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New											
Effective Date: MM/DD/YYYY 08/16/2017											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
Q	Q	30028	Q	32230	Q	64510	Q	5000	Q	100.00	
Q			Q		Q		Q				
Q			Q		Q		Q				
Q			Q		Q		Q				
Q			Q		Q		Q				
Total:										100.00	

☒ Default from Index

End/Terminate Job Record, SH9997-00 Student Wages Work Study

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY *		
Personnel Date: MM/DD/YYYY *		
Job Status: * (Not Enterable)	T	
Job Change Reason: (Not Enterable)	EJ	

Routing Queue

Approval Level	User Name	Required Action
04 - (SEAPRV) Student Employment APPROV	Q STUDENTHIRE_APPROVE	Studenthire Approve
04 - (HRAPLY) HR Apply	Q HR_APPLIER	HR Applier
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
<input type="button" value="Save and Add New Rows"/>		

Comment

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Student EPAF Instructions

New Hire - Student Salary Job

Listed below are Job Details and EPAF Steps to set up a student salary job for a student who has not worked for UNC (has no job history.)

Job Details:

Job Number:	SS9996 SS9999	International student salary Student salary
Job Suffix:	00 S0	Academic year and semester jobs (two zeros) Summer jobs (S-zero)
I-9 Date:	Date on Page 2 of the I-9 form	
Home Organization:	The Organization code for the hiring department or where the employee is located	
Distribution Orgn:	Same as the Home Organization	
Timesheet Orgn:	The Organization code where the salary amount is to be entered on the Banner PHATIME screen	
Job Starting Date:	The first day of month during which the employee begins work Student salary jobs must always start on the first day of a month. Summer jobs begin on the first day of May, June, July, or August	
Job Ending Date:	The last day of the month during which the employee completes work Student salary jobs must always end on the last day of a month. Academic year and semester jobs must end by May 31 st Summer jobs must end by August 31 st	
FOAP:	Fund, Organization, Account (see below), Program and optional Activity codes for wage expense	
Account Code:	64120 64125	Academic year and semester jobs Summer jobs

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.
4. The **Effective Date** defaults to Today's Date. Change the date to the job begin date; date must be in **MM/DD/YYYY** format.
5. Select the Approval Category: **Hire New Student Salary Empl never before worked @ UNC, SS001**.
6. Screen will display any Active jobs for the student. **There should be no Active jobs for a new hire.**
7. Click the **All Jobs** button.
8. Screen will display complete job history. **For a new hire there should not be job history.**
9. If there is job history, select a different **Approval Category** to add a salary job or to reactivate a salary job. (To make this change, click on **Return to EPAF Menu**, then **New EPAF** and select the new **Approval Category**.)
10. Click the **Go** button.
11. Screen returns with the fields for a **New Job**.
12. Type the Position number and Suffix in the **Position** and **Suffix** fields:
Position: SS9996 or SS9999
Suffix: 00 (2 zeros)
13. Click the **Go** button.
14. Complete the EPAF fields as noted below.
15. **Home Organization:** The Organization code for the hiring department. Type in the code or use the magnifying glass to select the code.
16. **Distribution Orgn:** Same as the Home Organization.
17. **I9 Date:** Type in the date from page 2 of the I-9 form; date must be in **MM/DD/YYYY** format.
18. **I9 Form Indicator:** Select **Received** from the drop down list. If I-9 is not received, add a Comment to your EPAF or contact Student Employment at 1-2628 for assistance.
19. **Timesheet Orgn:** The Organization code where the salary amount is to be entered on the Banner PHATIME screen. Type in the code or use the magnifying glass to select the code.
20. **FOAP Fields:** Default values will appear. **Type over the default values with your FOAP for wage expense.**
 - Effective Date = Defaults from the EPAF Effective Date. **Do not change this date.**
 - COA = Q; do not change this value
 - Index = Not used; leave blank
 - Fund = Fund code; if the Fund includes a letter, use a capital letter
 - Organization = Organization code
 - Account = Account code:
 - 64120** for academic year or semester jobs
 - 64125** for summer jobs
 - Program = Program code
 - Activity = Activity code; optional; use capital letter(s) if part of code
 - Location, Project, Cost = Not used; leave blank

- Percent = 100.00 % (or change if addition additional FOAP lines as noted below)
21. Additional FOAP lines can be added if needed (up to a total of 5 lines). The **COA** field must be completed for each line; change the **Percent** on each line so that the total is 100% for all lines.
 22. **Jobs Effective Date:** This is the job ending date. Date must be in **MM/DD/YYYY** format.
 23. **Personnel Date:** Type in the same job ending date (the job ending date is typed in both fields.)
 24. Verify **Routing Queue, User Name** fields (second column) contain required default values:
First line, User Name Column = **STUDENTHIRE_APPROVE**
Second line, User Name Column = **HR_APPLIER**
 25. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.
 26. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.
 27. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.
 28. It will take approximately 24 hours for the job to upload to Banner.
 29. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ Warning messages may appear and do not need follow-up action.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Contact the Payroll office at 1-2705 or Student Employment at 1-2628 for assistance.

- ✓ Salary amounts are not entered when the EPAF is set up. Salary amounts are entered on the Banner PHATIME screen for the specific payroll period that corresponds to the completion of the work or agreed upon pay date.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID:
Transaction: Effective Date: Dec 01, 2016
Transaction Status:
Approval Category: Hire New Student Salary Empl never before worked @ UNC, SS001

Save

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• - Indicates a required field.

New Student Employee-No prior job at UNC

Item	Current Value	New Value
Employee Status: (Not Enterable)	A	
Employee Class Code: (Not Enterable)	SS	
Home COAS: (Not Enterable)	Q	
Home Organization: *	Q	
Distribution Orgn: *	Q	
Original Hire Date: MM/DD/YYYY *	12/01/2016	
Current Hire Date: MM/DD/YYYY *	12/01/2016	
I9 Date: MM/DD/YYYY *	Not Selected	
I9 Form Indicator: *	-	
Term Reason Code: (Not Enterable)	-	
Termination Date: MM/DD/YYYY (Not Enterable)	-	

Add Additional Job record for Student SALARY Worker, SS9999-00 Student Salaried

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY *	12/01/2016	
Jobs Effective Date: MM/DD/YYYY *	12/01/2016	
Contract Type: (Not Enterable)	P	
Job Status: (Not Enterable)	A	
Employee Class Code: (Not Enterable)	SS	
Job Change Reason: (Not Enterable)	NEWIRE	
Step: (Not Enterable)	0	
Regular Rate: (Not Enterable)	0	
Factor: (Not Enterable)	24	
Pays: (Not Enterable)	24	
Timesheet Orgn: *	Q	
Workers Comp Code: (Not Enterable)	01	

FOAP/Percentage change on a new/reactivate job, SS9999-00 Student Salaried

Current
Effective Date: 12/01/2016
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New Effective Date: MM/DD/YYYY 12/01/2016											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
Q	Q	25215	Q 95152	Q 67999	Q 6000	Q	Q			100.00	
Q	Q		Q	Q	Q	Q	Q				
Q	Q		Q	Q	Q	Q	Q				
Q	Q		Q	Q	Q	Q	Q				
Q	Q		Q	Q	Q	Q	Q				
Total:										100.00	

✓
[Default from Index](#) [Save and Add New Rows](#)

End/Terminate Job Record, SS9999-00 Student Salaried

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY *		
Personnel Date: MM/DD/YYYY *		
Job Status: (Not Enterable)	T	
Job Change Reason: (Not Enterable)	EJ	

Routing Queue

Approval Level	User Name	Required Action
84 - (SEAPRV) Student Employment APPROV	Q STUDENTHIRE_APPROVE	Studenthire Approve
94 - (HRAPLY) HR Apply	Q HR_APPLIER	HR Applier
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected

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Comment

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Student EPAF Instructions

Add a Job - Non-Work Study Student Hourly Job

Listed below are Job Details and EPAF Steps to add a non-work study, student hourly job for a student (including an hourly job for an international student) who has UNC work history – the student is currently working for UNC or has previously worked for UNC.

When to add a job:

- Add a job when the student's job history shows no non-work study hourly jobs **or**
- Job history shows one or more non-work study hourly jobs but none of these jobs can be reactivated.

Job Details:

Job Number:	SH9996 SH9999	International student hourly Student hourly, non-work study
Job Suffix:	The suffix number you use will depend on the student's job history: 00, 01, 02, etc. Academic year and semester jobs (two numbers) S0, S1, S2, etc. Summer jobs (S followed by a number)	
Timesheet Orgn:	The Organization code where the employee's time sheet is to be routed for approval	
Hourly Rate of Pay:	Must be at least minimum wage but no more than \$15/hour	
Job Starting Date:	The first day of the work period that includes the employee's first day of work (PREFERRED) or the actual date the employee begins work No earlier than August 16 th for academic year and semester hourly jobs No earlier than May 16 th for summer hourly jobs	
Job Ending Date:	The last day of the work period that includes the employee's last day of work No later than May 15 th for academic year and semester hourly jobs No later than August 15 th for summer hourly jobs	
FOAP:	Fund, Organization, Account (see below), Program and optional Activity codes for wage expense	

Account: **64110** for academic year or semester jobs
64115 for summer jobs

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.
4. The **Effective Date** defaults to Today's Date. Change the date to the job begin date; date must be in **MM/DD/YYYY** format.
5. Select the Approval Category: **Add Another Student Hrly Job record for current employee, SH002**.
6. Screen will display any Active jobs for the student.
7. Click the **All Jobs** button to see both Active and Termed jobs.
8. Screen will display complete job history.
9. Review the job history. If there is a termed non-work study hourly job that can be reactivated, you will need to use the **Approval Category** to **reactivate** an hourly job. (To make this change, click on **Return to EPAF Menu**, then **New EPAF** and select the new **Approval Category**.)
10. Click the **Go** button.
11. Screen returns with the fields for a **New Job**.
12. Type the Position number in the **Position** field:
Position: SH9996 or SH9999
13. Type the Suffix number in the **Suffix** field:
 - For academic year or semester jobs, use suffix **00** (2 zeros) if your job will be the first one with your position number. If there is a job(s) in the history with the same position number as your job, use the next available suffix **01, 02, 03, etc.**
 - For summer jobs, use suffix **S0** (S-zero) if your job will be the first one with your position number. If there is a job(s) in the history with the same position number as your job, use the next available suffix **S1, S2, S3, etc.**
 - **Remember:** Make sure your job/suffix number combination does not match another job number/suffix combination in the job history, either active or termed.
14. Click the **Go** button.
15. Complete the EPAF fields as noted below.
16. **Regular Rate:** Type in the hourly rate of pay.
17. **Timesheet Orgn:** The Organization code for time sheet approval. Type in the code or use the magnifying glass to select the code.

18. **FOAP Fields:** Default values will appear. **Type over these values with your FOAP for wage expense.**

Effective Date = Defaults from the EPAF Effective Date. **Do not change this date.**

COA = Q; do not change this value

Index = Not used; leave blank

Fund = Fund code; if the Fund includes a letter, use a capital letter

Organization = Organization code

Account = Account code:

64110 for academic year or semester jobs

64115 for summer jobs

Program = Program code

Activity = Activity code; optional; use capital letter(s) if part of code

Location, Project, Cost = Not used; leave blank

Percent = 100.00 % (or change if adding additional FOAP lines as noted below)

19. Additional FOAP lines can be added if needed (up to a total of 5 lines). The **COA** field must be completed for each line; change the **Percent** on each line so that the total is 100% for all lines.

20. **Jobs Effective Date:** This is the job ending date. Date must be in **MM/DD/YYYY** format.

21. **Personnel Date:** Type in the same job ending date (the job ending date is typed in both fields.)

22. Verify **Routing Queue, User Name** fields (second column) contain required default values:

First line, User Name Column = **STUDENTHIRE_APPROVE**

Second line, User Name Column = **HR_APPLIER**

23. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.

24. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.

25. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.

26. It will take approximately 24 hours for the job to upload to Banner.

27. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ Warning messages may appear and do not need follow-up action.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Student employee records are inactivated when it has been more than 6 months since their last pay check. **You will receive an error message when you submit your EPAF if the student's employee record is inactive.** Contact Student Employment at 1-2628 to request the record be reactivated. Once the record has been reactivated, you will need to re-submit your EPAF.
- ✓ Contact the Payroll office at 1-2705 for EPAF assistance.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID:
Transaction: Effective Date: Jan 16, 2017
Transaction Status:
Approval Category: Add Another Student Hrly Job record for current employee, SH002

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* - Indicates a required field.

Add an Additional Job for Student Hourly 2, SH9999-00 Student Wages Non-Work Study

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		01/16/2017
Jobs Effective Date: MM/DD/YYYY*		01/16/2017
Contract Type: *(Not Enterable)		S
Job Status: *(Not Enterable)		A
Job Change Reason: *(Not Enterable)		BJ
Step: *(Not Enterable)		0
Regular Rate: *		
Factor: *(Not Enterable)		24
Pays: *(Not Enterable)		24
Timesheet Orgn: *		
Workers Comp Code: *(Not Enterable)		01

FOAP/Percentage change on a new/reactivate job, SH9999-00 Student Wages Non-Work Study

Current

Effective Date: 01/16/2017

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

New

Effective Date: MM/DD/YYYY 01/16/2017

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
Q	Q	25215	Q	95152	Q	67999	Q	6000	Q	100.00	
Q		Q	Q	Q	Q	Q	Q				
Q		Q	Q	Q	Q	Q	Q				
Q		Q	Q	Q	Q	Q	Q				
Q		Q	Q	Q	Q	Q	Q				
Total:										100.00	



End/Terminate Job Record, SH9999-00 Student Wages Non-Work Study

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		
Personnel Date: MM/DD/YYYY*		
Job Status: *(Not Enterable)		T
Job Change Reason: (Not Enterable)		EJ

Routing Queue

Approval Level	User Name	Required Action
84 - (SEAPRV) Student Employment APPROV	STUDENTHIRE_APPROVE	Studenthire Approve
94 - (HRAPLY) HR Apply	HR_APPLIER	HR Applier
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Save and Add New Rows		

Comment

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Student EPAF Instructions

Add a Job – Federal Work Study Student Hourly Job

Listed below are Job Details and EPAF Steps to add a federal work study student hourly job for a student who has UNC work history – the student is currently working for UNC or has previously worked for UNC.

When to add a job:

- Add a job when the student's job history shows no federal work study hourly jobs **or**
- Job history shows one or more federal work study hourly jobs but none of these jobs can be reactivated.

Job Details:

Job Number:	SH9998 Federal work study hourly
Job Suffix:	The suffix number you use will depend on the student's job history: 00, 01, 02, etc. for academic year or semester jobs
Timesheet Orgn:	The Organization code where the employee's time sheet is to be routed for approval
Hourly Rate of Pay:	Must be at least minimum wage but no more than \$15/hour
Job Starting Date:	The first day of the work period that includes the employee's first day of work (PREFERRED) or the actual date the employee begins work No earlier than August 16 th for academic year and semester jobs
Job Ending Date:	The last day of the work period that includes the employee's last day of work No later than May 15 th for academic year and semester jobs
FOAP:	Fund, Organization, Account (see below), Program and optional Activity codes for wage expense
Account:	64410 Federal work study jobs

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.
4. The **Effective Date** defaults to Today's Date. Change the date to the job begin date; date must be in **MM/DD/YYYY** format.
5. Select the Approval Category: **Add Another Student Hrly Job record for current employee, SH002**.
6. Screen will display any Active jobs for the student.
7. Click the **All Jobs** button to see both Active and Termed jobs.
8. Screen will display complete job history.
9. Review the job history. If there is a termed federal work study job that can be reactivated, you will need to use the **Approval Category** to **reactivate** an hourly job. (To make this change, click on **Return to EPAF Menu**, then **New EPAF** and select the new **Approval Category**.)
10. Click the **Go** button.
11. Screen returns with the fields for a **New Job**.
12. Type the Position number in the **Position** field: **SH9998**.
13. Type the Suffix number in the **Suffix** field:
 - If your job will be the first federal work study job, use suffix **00** (2 zeros).
 - If there is a federal work study job(s) in the job history, use the next available suffix **01, 02, 03, etc**.
 - **Remember:** Make sure your job/suffix number combination does not match another job number/suffix combination in the job history, either active or termed.
14. Click the **Go** button.
15. Complete the EPAF fields as noted below.
16. **Regular Rate:** Type in the hourly rate of pay.
17. **Timesheet Orgn:** The Organization code for time sheet approval. Type in the code or use the magnifying glass to select the code.
18. **FOAP Fields:** Federal work study wage expense is split between the hiring department (25%) and work study funds (75%). Default values will appear on 2 FOAP lines.
19. Type over the default values on the first line (non-work study FOAP line) with the **department FOAP for wage expense**.
 - Effective Date = Defaults from the EPAF Effective Date. **Do not change this date.**
 - COA = Q; do not change this value
 - Index = Not used; leave blank
 - Fund = Fund code; if the Fund includes a letter, use a capital letter
 - Organization = Organization code
 - Account = **64410**
 - Program = Program code
 - Activity = Activity code; optional; use capital letter(s) if part of code
 - Location, Project, Cost = Not used; leave blank
 - Percent = 25.00

20. **Change the Organization code from the default value 32230 to your department Organization code:**

COA = Q
Index = Not used; blank
Fund = **Current Federal Work Study Fund** (the Fund number changes every year)
Organization = **Department Organization code**
Account = 64410
Program = 5000
Activity = Not used; blank
Location, Project, Cost = Not used; blank
Percent = 75.00 %

21. Additional FOAP lines can be added for department wage expense only, if needed (up to a total of 4 department lines.) The **COA** field must be completed for each line; change the **Percent** on each department line so that the total department wage expense remains at 25%.

22. **Jobs Effective Date:** This is the job ending date. Date must be in **MM/DD/YYYY** format.

23. **Personnel Date:** Type in the same job ending date (the job ending date is typed in both fields.)

24. Verify **Routing Queue, User Name** fields (second column) contain required default values:

First line, User Name Column = **STUDENTHIRE_APPROVE**

Second line, User Name Column = **HR_APPLIER**

25. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.

26. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.

27. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.

28. It will take approximately 24 hours for the job to upload to Banner.

29. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ Warning messages may appear and do not need follow-up action.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Student employee records are inactivated when it has been more than 6 months since their last paycheck. **You will receive an error message when you submit your EPAF if the student's employee record is inactive.** Contact Student Employment at 1-2628 to request the record be reactivated. Once the record is reactivated, you will need to re-submit your EPAF.
- ✓ Contact the Payroll office at 1-2705 for EPAF assistance.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID:
Transaction: Effective Date: Aug 16, 2017
Transaction Status:
Approval Category: Add Another Student Hrly Job record for current employee, SH002

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* - Indicates a required field.

Add an Additional Job for Student Hourly 2, SH9998-00 Federal Work Study

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		08/16/2017
Jobs Effective Date: MM/DD/YYYY*		08/16/2017
Contract Type: *(Not Enterable)		S
Job Status: *(Not Enterable)		A
Job Change Reason: *(Not Enterable)		B1
Step: *(Not Enterable)		0
Regular Rate: *		
Factor: *(Not Enterable)		24
Pays: *(Not Enterable)		24
Timesheet Orgn: *		
Workers Comp Code: *(Not Enterable)		01

FOAP/Percentage change on a new/reactivate job, SH9998-00 Federal Work Study

Current

Effective Date: 08/16/2017

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

New

Effective Date: MM/DD/YYYY 08/16/2017

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
Q		39008	32230	64410	5000					75.00		
Q		25215	95152	67999	6000					25.00		
Q												
Q												
Q												
Q												
Total:										100.00		

✓

End/Terminate Job Record, SH9998-00 Federal Work Study

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		
Personnel Date: MM/DD/YYYY*		
Job Status: *(Not Enterable)		T
Job Change Reason: (Not Enterable)		EJ

Routing Queue

Approval Level	User Name	Required Action
84 - (SEAPRV) Student Employment APPROV	STUDENTHIRE_APPROVE	Approve
94 - (HRAPLY) HR Apply	HR_APPLIER	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Comment

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Student EPAF Instructions

Add a Job – State Work Study Student Hourly Job

Listed below are Job Details and EPAF Steps to add a state work study student hourly job for a student who has UNC work history – the student is currently working for UNC or has previously worked for UNC.

When to add a job:

- Add a job when the student's job history shows no state work study hourly jobs **or**
- Job history shows one or more state work study hourly jobs but none of these jobs can be reactivated.

Job Details:

Job Number:	SH9997 State work study hourly
Job Suffix:	The suffix number you use will depend on the student's job history: 00, 01, 02, etc. for academic year or semester jobs
Timesheet Orgn:	The Organization code where the employee's time sheet is to be routed for approval
Hourly Rate of Pay:	Must be at least minimum wage but no more than \$15/hour
Job Starting Date:	The first day of the work period that includes the employee's first day of work (PREFERRED) or the actual date the employee begins work No earlier than August 16 th for academic year and semester jobs
Job Ending Date:	The last day of the work period that includes the employee's last day of work No later than May 15 th for academic year and semester jobs
FOAP:	Fund, Organization, Account (see below), Program and optional Activity codes for wage expense
Account:	64510 State work study jobs

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.
4. The **Effective Date** defaults to Today's Date. Change the date to the job begin date; date must be in **MM/DD/YYYY** format.
5. Select the Approval Category: **Add Another Student Hrly Job record for current employee, SH002**.
6. Screen will display any Active jobs for the student.
7. Click the **All Jobs** button to see both Active and Termed jobs.
8. Screen will display complete job history.
9. Review the job history. If there is a termed state work study job that can be reactivated, you will need to use the **Approval Category** to **reactivate** an hourly job. (To make this change, click on **Return to EPAF Menu**, then **New EPAF** and select the new **Approval Category**.)
10. Click the **Go** button.
11. Screen returns with the fields for a **New Job**.
12. Type the Position number in the **Position** field: **SH9997**.
13. Type the Suffix number in the **Suffix** field:
 - If your job will be the first state work study job, use suffix **00** (2 zeros).
 - If there is a state work study job(s) in the job history, use the next available suffix **01, 02, 03, etc.**
 - **Remember:** Make sure your job/suffix number combination does not match another job number/suffix combination in the job history, either active or termed.
14. Click the **Go** button.
15. Complete the EPAF fields as noted below.
16. **Regular Rate:** Type in the hourly rate of pay.
17. **Timesheet Orgn:** The Organization code for time sheet approval. Type in the code or use the magnifying glass to select the code.
18. **FOAP Fields:** Default values will appear as noted below. **Change the Organization code from the default value 32230 to your department Organization code.**
 - Effective Date = Defaults from the EPAF Effective Date. **Do not change this date.**
 - COA = Q
 - Index = Not used; blank
 - Fund = **Current State Work Study Fund** (the Fund number changes every year)
 - Organization = **Department Organization code**
 - Account = 64510
 - Program = 5000
 - Activity = Not used; blank
 - Location, Project, Cost = Not used; blank
 - Percent = 100.00 %

19. **Jobs Effective Date:** This is the job ending date. Date must be in **MM/DD/YYYY** format.
20. **Personnel Date:** Type in the same job ending date (the job ending date is typed in both fields.)
21. Verify **Routing Queue, User Name** fields (second column) contain required default values:

First line, User Name Column	= STUDENTHIRE_APPROVE
Second line, User Name Column	= HR_APPLIER
22. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.
23. **Comment.** Required for state work study jobs. Type the FOAP (Fund, Organization, Account, Program and optional Activity codes) for departmental wage expense that is to be used in the event work study funds are depleted.
24. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.
25. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.
26. It will take approximately 24 hours for the job to upload to Banner.
27. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ Warning messages may appear and do not need follow-up action.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Student employee records are inactivated when it has been more than 6 months since their last paycheck. **You will receive an error message when you submit your EPAF if the student's employee record is inactive.** Contact Student Employment at 1-2628 to request the record be reactivated. Once the record is reactivated, you will need to re-submit your EPAF.
- ✓ Contact the Payroll office at 1-2705 for EPAF assistance.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID:

Transaction:

Effective Date: Aug 16, 2017

Transaction Status:

Approval Category: Add Another Student Hrly Job record for current employee, SH002

Save

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* - indicates a required field.

Add an Additional Job for Student Hourly 2, SH9997-00 Student Wages Work Study

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		08/16/2017
Jobs Effective Date: MM/DD/YYYY*		08/16/2017
Contract Type: *(Not Enterable)		S
Job Status: *(Not Enterable)		A
Job Change Reason: *(Not Enterable)		BJ
Step: *(Not Enterable)		0
Regular Rate: *		
Factor: *(Not Enterable)		24
Pays: *(Not Enterable)		24
Timesheet Orgn: *		
Workers Comp Code: *(Not Enterable)		01

FOAP/Percentage change on a new/reactivate job, SH9997-00 Student Wages Work Study

Current

Effective Date: 08/16/2017

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

New

Effective Date: MM/DD/YYYY 08/16/2017

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
Q		30028	32230	64510	5000					100.00		
Total:										100.00		

✓

Default from Index

Save and Add New Rows

End/Terminate Job Record, SH9997-00 Student Wages Work Study

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		
Personnel Date: MM/DD/YYYY*		
Job Status: *(Not Enterable)		T
Job Change Reason: (Not Enterable)		EJ

Routing Queue

Approval Level	User Name	Required Action
84 - (SEAPRV) Student Employment APPROV	STUDENTHIRE_APPROVE	Studenthire Approve
94 - (HRAPLY) HR Apply	HR_APPLIER	HR Applier
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Save and Add New Rows

Comment

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Save

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Student EPAF Instructions

Add a Job – Student Salary Job

Listed below are Job Details and EPAF Steps to add a student salary job for a student (including a salary job for an international student) who has UNC work history – the student is currently working for UNC or has previously worked for UNC.

When to add a job:

- Add a job when the student's job history shows no student salary jobs **or**
- Job history shows one or more student salary jobs but none of these jobs can be reactivated.

Job Details:

Job Number:	SS9996 SS9999	International student salary Student salary
Job Suffix:	The suffix number you use will depend on the student's job history: 00, 01, 02, etc. Academic year and semester jobs (two numbers) S0, S1, S2, etc. Summer jobs (S followed by a number)	
Timesheet Orgn:	The Organization code where the salary amount is to be entered on the Banner PHATIME screen	
Job Starting Date:	The first day of the month during which the employee begins work Student salary jobs must always start on the first day of a month. Summer jobs begin on the first day of May, June, July, or August	
Job Ending Date:	The last day of the month during which the employee completes work Student salary jobs must always end on the last day of a month. Academic year and semester jobs must end by May 31 st Summer jobs must end by August 31 st	
FOAP:	Fund, Organization, Account (see below), Program and optional Activity codes for wage expense	
Account Code:	64120 64125	Academic year and semester jobs Summer jobs

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.
4. The **Effective Date** defaults to Today's Date. Change the date to the job begin date; date must be in **MM/DD/YYYY** format.
5. Select the Approval Category: **Add Another Student Salary job record for current employee, SS002**.
6. Screen will display any Active jobs for the student.
7. Click the **All Jobs** button to see both Active and Termed jobs.
8. Screen will display complete job history.
9. Review the job history. If there is a termed student salary job that can be reactivated, you will need to use the **Approval Category** to **reactivate** a salary job. (To make this change, click on **Return to EPAF Menu**, then **New EPAF** and select the new **Approval Category**.)
10. Click the **Go** button.
11. Screen returns with the fields for a **New Job**.
12. Type the Position number in the **Position** field:
Position: SS9996 or SS9999
13. Type the Suffix number in the **Suffix** field:
 - For academic year or semester jobs, use suffix **00** (2 zeros) if your job will be the first one with your position number. If there is a job(s) in the history with the same position number as your job, use the next available suffix **01, 02, 03, etc.**
 - For summer jobs, use suffix **S0** (S-zero) if your job will be the first one with your position number. If there is a job(s) in the history with the same position number as your job, use the next available suffix **S1, S2, S3, etc.**
 - **Remember:** Make sure your job/suffix number combination does not match another job number/suffix combination in the job history, either active or termed.
14. Click the **Go** button.
15. Complete the EPAF fields as noted below.
16. **Timesheet Orgn:** The Organization code where the salary amount is to be entered on the Banner PHATIME screen. Type in the code or use the magnifying glass to select the code.
17. **FOAP Fields:** Default values will appear. **Type over these values with your FOAP for wage expense.**
 - Effective Date = Defaults from the EPAF Effective Date. **Do not change this date.**
 - COA = Q; do not change this value
 - Index = Not used; leave blank
 - Fund = Fund code; if the Fund includes a letter, use a capital letter
 - Organization = Organization code
 - Account = Account code:
 - 64120** for academic year or semester jobs
 - 64125** for summer jobs
 - Program = Program code
 - Activity = Activity code; optional; use capital letter(s) if part of code

Location, Project, Cost = Not used; leave blank

Percent = 100.00 % (or change if addition additional FOAP lines as noted below)

18. Additional FOAP lines can be added if needed (up to a total of 5 lines). The **COA** field must be completed for each line; change the **Percent** on each line so that the total is 100% for all lines.
19. **Jobs Effective Date:** This is the job ending date. Date must be in **MM/DD/YYYY** format.
20. **Personnel Date:** Type in the same job ending date (the job ending date is typed in both fields.)
21. Verify **Routing Queue, User Name** fields (second column) contain required default values:
First line, User Name Column = **STUDENTHIRE_APPROVE**
Second line, User Name Column = **HR_APPLIER**
22. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.
23. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.
24. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.
25. It will take approximately 24 hours for the job to upload to Banner.
26. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ Warning messages may appear and do not need follow-up action.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Student employee records are inactivated when it has been more than 6 months since their last pay check. **You will receive an error message when you submit your EPAF if the student's employee record is inactive.** Contact Student Employment at 1-2628 to request the record be reactivated. Once the record has been reactivated, you will need to re-submit your EPAF.
- ✓ Contact the Payroll office at 1-2705 for EPAF assistance.

- ✓ Salary amounts are not entered when the EPAF is set up. Salary amounts are entered using the Banner PHATIME screen for the specific payroll that corresponds to the completion of the work or agreed upon pay date.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: _____

Transaction: _____

Effective Date: Jan 01, 2017

Transaction Status: _____

Approval Category: Add Another Student Salary Job record for current employee, SS002

Save

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* - indicates a required field.

Add Additional Job record for Student SALARY Worker, SS9999-00 Student Salaried

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		01/01/2017
Jobs Effective Date: MM/DD/YYYY*		01/01/2017
Contract Type: *(Not Enterable)		S
Job Status: *(Not Enterable)		A
Employee Class Code: *(Not Enterable)		SS
Job Change Reason: *(Not Enterable)		BJ
Step: *(Not Enterable)		0
Regular Rate: *(Not Enterable)		0
Factor: *(Not Enterable)		24
Pays: *(Not Enterable)		24
Timesheet Orgn: *		Q
Workers Comp Code: *(Not Enterable)		01

FOAP/Percentage change on a new/reactivate job, SS9999-00 Student Salaried

Current

Effective Date: 01/01/2017

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

New

Effective Date: MM/DD/YYYY 01/01/2017

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
Q		25215	Q	95152	Q	67999	Q	6000	Q		100.00		
Q			Q		Q		Q		Q				
Q			Q		Q		Q		Q				
Q			Q		Q		Q		Q				
Q			Q		Q		Q		Q				
Total:											100.00		

✓

[Default from Index](#) | [Save and Add New Rows](#)

End/Terminate Job Record, SS9999-00 Student Salaried

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		
Personnel Date: MM/DD/YYYY*		
Job Status: *(Not Enterable)		T
Job Change Reason: (Not Enterable)		EJ

Routing Queue

Approval Level	User Name	Required Action
84 - (SEAPRV) Student Employment APPROV	STUDENTHIRE_APPROVE	Studenthire Approve
94 - (HRAPLY) HR Apply	HR_APPLIER	HR Applier
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

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Comment

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Save

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Student EPAF Instructions

Reactivate a Job – Non-Work Study Student Hourly Job

Listed below are Job Details and EPAF Steps to reactivate a non-work study, student hourly job for a student (including an hourly job for an international student) who has UNC work history – the student is currently working for UNC or has previously worked for UNC.

When to reactivate a job:

- Reactivate a job when the student's job history shows a non-work study hourly job with a term date prior to your job start date **and**
- The suffix number for the termed job matches your work period – academic year or summer.
- Reactivating creates a new job by re-using the SAME job number and suffix of a previously termed job.
- Reactivating a job replaces the old job dates and details with NEW job dates and details.

Job Details:

Job Number:	Choose a job of the same type as the job you are hiring: SH9996 International student hourly SH9999 Student hourly, non-work study
Job Suffix:	Choose a job with a suffix that matches your hiring period: 00, 01, 02, etc. for academic year or semester jobs S0, S1, S2, etc. for summer jobs
Employee Class Code:	SW (Student Wages)
Timesheet Orgn:	The Organization code where the employee's time sheet is to be routed for approval
Hourly Rate of Pay:	Must be at least minimum wage but no more than \$15/hour
Job Starting Date:	The first day of the work period that includes the employee's first day of work (PREFERRED) or the actual date the employee begins work No earlier than August 16 th for academic year and semester hourly jobs No earlier than May 16 th for summer hourly jobs
Job Ending Date:	The last day of the work period that includes the employee's last day of work No later than May 15 th for academic year and semester hourly jobs

FOAP: No later than August 15th for summer hourly jobs
Fund, Organization, Account (see below), Program and optional Activity codes for wage expense

Account: **64110** for academic year or semester jobs
64115 for summer jobs

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.
4. The **Effective Date** defaults to Today's Date. Change the date to the job begin date; date must be in **MM/DD/YYYY** format.
5. Select the Approval Category: **Studnt Hrly, Reactivate existing job record w/prior term row, SH004**.
6. Screen will display any Active jobs for the student.
7. Click the **All Jobs** button to see both Active and Termed jobs.
8. Screen will display complete job history.
9. Review job history to find the job to be reactivated, using the following criteria:
 - Choose the job that has a position number and suffix combination that matches your job;
 - The job selected for reactivation must have an **End Date** that is prior to the beginning date of your new job;
 - If more than one job meets the criteria, choose the job with the lowest suffix number;
 - **Remember:** if you are hiring for a summer job you must choose a job with a summer suffix.
10. If there is not a job that can be reactivated, you will need to use the **Approval Category** to add an hourly job. (To make this change, click on **Return to EPAF Menu**, then **New EPAF** and select the new **Approval Category**.)
11. Click the **Go** button.
12. Click the **All Jobs** button again to reveal the radio buttons to the right of the job history details.
13. Select the job to be reactivated by clicking the **Select** radio button on the right side of the job details.
14. Click the **Go** button.
15. The prior job details will appear on the screen under the Current Value column. You will enter the new job details under the **New Value** column.
16. Complete the EPAF fields as noted below.
17. **Employee Class Code:** **SW** for non-work study job. Type in the code or use the magnifying glass to select the code.
18. **Regular Rate:** Type in the hourly rate of pay.
19. **Timesheet Orgn:** The Organization code for time sheet approval. Type in the code or use the magnifying glass to select the code.

20. **FOAP Fields:** Values from the prior job carry forward. **Type over these values with your FOAP for wage expense.**

Effective Date = Defaults from the EPAF Effective Date. **Do not change this date.**

COA = Q; do not change this value

Index = Not used; leave blank

Fund = Fund code; if the Fund includes a letter, use a capital letter

Organization = Organization code

Account = Account code:

64110 for academic year or semester jobs

64115 for summer jobs

Program = Program code

Activity = Activity code; optional; use capital letter(s) if part of code

Location, Project, Cost = Not used; leave blank

Percent = 100.00 % (or change if adding additional FOAP lines as noted below)

21. Additional FOAP lines can be added if needed (up to a total of 5 lines). The **COA** field must be completed for each line; change the **Percent** on each line so that the total is 100% for all lines.
22. To remove a FOAP line, highlight each FOAP element and delete the values, including the values in the **COA** and **Percent** fields. Do not space through the values; use the Delete key. Update the **Percent** field as needed so that the total is 100% for all lines.
23. **Jobs Effective Date:** This is the job ending date. Date must be in **MM/DD/YYYY** format.
24. **Personnel Date:** Type in the same job ending date (the job ending date is typed in both fields.)
25. Verify **Routing Queue, User Name** fields (second column) contain required default values:
- First line, User Name Column = **STUDENTHIRE_APPROVE**
- Second line, User Name Column = **HR_APPLIER**
26. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.
27. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.
28. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.
29. It will take approximately 24 hours for the job to upload to Banner.
30. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ Warning messages may appear and do not need follow-up action.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Student employee records are inactivated when it has been more than 6 months since their last pay check. **You will receive an error message when you submit your EPAF if the student's employee record is inactive.** Contact Student Employment at 1-2628 to request the record be reactivated. Once the record has been reactivated, you will need to re-submit your EPAF.
- ✓ Contact the Payroll office at 1-2705 for EPAF assistance.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID:

Transaction:

Transaction Status:

Approval Category: Studnt Hrlly, Reactivate existing job record w/prior term row, SH004

Effective Date: Aug 16, 2019

Save

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* - indicates a required field.

Reactivate existing Stud hrlly Job record 2, SH9999-00 Student Wages Non-Work Study, Last Paid Date: May 15, 2019

Item	Current Value	New Value
Job End Date: MM/DD/YYYY*(Not Enterable)	05/15/2019	-
Jobs Effective Date: MM/DD/YYYY*	05/15/2019	08/16/2019
Job Status: *(Not Enterable)	Terminated	A
Job Change Reason: *(Not Enterable)	EJ	B3
Employee Class Code:	SW, Student Wages	
Step: *(Not Enterable)	0	0
Regular Rate: *		
Factor: *(Not Enterable)	24	24
Pays: *(Not Enterable)	24	24
Timesheet Orgn: *		

FOAP/Percentage change on a new/reactivate job, SH9999-00 Student Wages Non-Work Study, Last Paid Date: May 15, 2019

Current

Effective Date: 11/01/2018

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

Q 100.00

New

Effective Date: MM/DD/YYYY 08/16/2019

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
Q				64110						100.00			
Q													
Q													
Q													
Q													
Total:										100.00			

✓ Defaulting values for Labor Distribution from the Job records.

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End/Terminate Job Record, SH9999-00 Student Wages Non-Work Study, Last Paid Date: May 15, 2019

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	05/15/2019	
Personnel Date: MM/DD/YYYY*	05/15/2019	
Job Status: *(Not Enterable)	Terminated	T
Job Change Reason: (Not Enterable) EJ		EJ

Routing Queue

Approval Level	User Name	Required Action
84 - (SEAPRV) Student Employment APPROVE	STUDENTHIRE_APPROVE	Studenthire Approve
94 - (HRAPLY) HR Apply	HR_APPLIER	HR Applier
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Save and Add New Rows		

Comment

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Student EPAF Instructions

Reactivate a Job – Federal Work Study Student Hourly Job

Listed below are Job Details and EPAF Steps to reactivate a federal work study student hourly job for a student who has UNC work history – the student is currently working for UNC or has previously worked for UNC.

When to reactivate a job:

- Reactivate a job when the student's job history shows a federal work study job with a term date prior to your job start date.
- Reactivating creates a new job by re-using the SAME job number and suffix of a previously termed job.
- Reactivating a job replaces the old job dates and details with NEW job dates and details.

Job Details:

Job Number:	Choose a job of the same type as the job you are hiring: SH9998 Federal work study hourly
Job Suffix:	00, 01, 02, etc. for academic year or semester jobs
Employee Class Code:	WS (Student Work Study)
Timesheet Orgn:	The Organization code where the employee's time sheet is to be routed for approval
Hourly Rate of Pay:	Must be at least minimum wage but no more than \$15/hour
Job Starting Date:	The first day of the work period that includes the employee's first day of work (PREFERRED) or the actual date the employee begins work No earlier than August 16 th for academic year and semester jobs
Job Ending Date:	The last day of the work period that includes the employee's last day of work No later than May 15 th for academic year and semester jobs
FOAP:	Fund, Organization, Account (see below), Program and optional Activity codes for wage expense
Account:	64410 Federal work study jobs

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.
4. The **Effective Date** defaults to Today's Date. Change the date to the job begin date; date must be in **MM/DD/YYYY** format.
5. Select the Approval Category: **Student Hrly, Reactivate existing job record w/prior term row, SH004**.
6. Screen will display any Active jobs for the student.
7. Click the **All Jobs** button to see both Active and Termed jobs.
8. Screen will display complete job history.
9. Review job history to find the job to be reactivated, using the following criteria:
 - Look for a federal work study job (SH9998) with an **End Date** that is prior to the beginning date of your new job;
 - If more than one job meets the criteria, choose the job with the lowest suffix number;
10. If there is not a job that can be reactivated, select the **Approval Category** to **add** an hourly job. (To make this change, click on **Return to the EPAF Menu**, then **New EPAF**, and select the new **Approval Category**.)
11. Click the **Go** button.
12. Click the **All Jobs** button again to reveal the radio buttons to the right of the job history details.
13. Select the job to be reactivated by clicking the **Select** radio button on the right side of the job details.
14. Click the **Go** button.
15. The prior job details will appear on the screen under the Current Value column. You will enter your job details under the **New Value** column.
16. Complete the EPAF fields as noted below:
17. **Employee Class Code: WS** for work study job. Type in the code or use the magnifying glass to select the code.
18. **Regular Rate:** Type in the hourly rate of pay.
19. **Timesheet Orgn:** The Organization code for time sheet approval. Type in the code or use the magnifying glass to select the code.
20. **FOAP Fields:** Federal work study wage expense is split between the hiring department (25%) and work study funds (75%). **Values from the prior job carry forward.**

21. Update the department FOAP line by typing over the values as needed for your department FOAP.
 - Effective Date = Defaults from the EPAF Effective Date. **Do not change this date.**
 - COA = Q; do not change this value
 - Index = Not used; leave blank
 - Fund = Fund; if the Fund includes a letter, use a capital letter
 - Organization = Organization code
 - Account = **64410**
 - Program = Program code
 - Activity = Activity code; optional; use capital letter(s) if part of code
 - Location, Project, Cost = Not used; leave blank
 - Percent = 25.00% (or current year's funding percent)
22. **You will need to update the work study FOAP line.** Update the work study FOAP line by typing over the values as needed for the current year's funding and **changing the Organization code from 32230 to your department Organization code.**
 - COA = Q; do not change this value
 - Index = Not used; leave blank
 - Fund = **Current Federal Work Study Fund** (the Fund number changes every year)
 - Organization = **Department Organization code**
 - Account = **64410**
 - Program = **Department Program code**
 - Activity = Not used; **delete any values**
 - Location, Project, Cost = Not used; leave blank
 - Percent = **75.00%** (or current year's funding percent)
23. Additional FOAP lines can be added for department wage expense (up to a total of 4 department lines). The **COA** field must be completed for each line; change the **Percent** on each department line so that the total department wage expense remains at 25%.
24. To remove a FOAP line, highlight each FOAP element and delete the values, including the value in the **Percent** field. Do not space through the values; use the Delete key. Update the **Percent** field as needed so that the total of all lines is 100%.
25. **Jobs Effective Date:** This is the job ending date. Date must be in **MM/DD/YYYY** format.
26. **Personnel Date:** Type in the same job ending date (the job ending date is typed in both fields.)
27. Verify **Routing Queue, User Name** fields (second column) contain required default values:
 - First line, User Name Column = **STUDENTHIRE_APPROVE**
 - Second line, User Name Column = **HR_APPLIER**
28. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.
29. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.
30. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.
31. It will take approximately 24 hours for the job to upload to Banner.

32. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ Warning messages may appear and do not need follow-up action.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Student employee records are inactivated when it has been more than 6 months since their last paycheck. **You will receive an error message when you submit your EPAF if the student's employee record is inactive.** Contact Student Employment at 1-2628 to request the record be reactivated. Once the record is reactivated, you will need to re-submit your EPAF.
- ✓ Contact the Payroll office at 1-2705 for EPAF assistance.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID:

Transaction:

Effective Date: Aug 16, 2019

Transaction Status:

Approval Category: Student Hrly, Reactivate existing job record w/prior term row, SH004

Save

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* - indicates a required field.

Reactivate existing Stud hrly Job record 2, SH9998-00 Federal Work Study, Last Paid Date: Feb 28, 2019

Item	Current Value	New Value
Job End Date: MM/DD/YYYY* (Not Enterable)	02/28/2019	
Jobs Effective Date: MM/DD/YYYY*	02/28/2019	08/16/2019
Job Status: * (Not Enterable)	Terminated	A
Job Change Reason: * (Not Enterable)	OTHER	B3
Employee Class Code:	WS, Student Work Study	
Step: * (Not Enterable)	0	0
Regular Rate: *		
Factor: * (Not Enterable)	24	24
Pays: * (Not Enterable)	24	24
Timesheet Orgn: *		

FOAP/Percentage change on a new/reactivate job, SH9998-00 Federal Work Study, Last Paid Date: Feb 28, 2019

Current									
Effective Date: 09/16/2018									
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost Percent
Q		64410							25.00
Q	39009	64410							75.00

New													
Effective Date: MM/DD/YYYY 08/16/2019													
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override End Date	
Q	Q	39009		64410						75.00			
Q				64410						25.00			
Q													
Q													
Q													
Q													
Update the Work Study Fund number for the current year; use your Department Organization and Program codes in the Work Study FOAP line										Total:	100.00		

✓ Defaulting values for Labor Distribution from the Job records.

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End/Terminate Job Record, SH9998-00 Federal Work Study, Last Paid Date: Feb 28, 2019

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	02/28/2019	
Personnel Date: MM/DD/YYYY*	02/28/2019	
Job Status: * (Not Enterable)	Terminated	T
Job Change Reason: (Not Enterable) OTHER		EJ

Routing Queue

Approval Level	User Name	Required Action
84 - (SEAPRV) Student Employment APPROVE	STUDENTHIRE_APPROVE	Studenthire Approve
94 - (HRAPLY) HR Apply	HR_APPLIER	HR Applier
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

[Save and Add New Rows](#)

Comment

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Save

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Student EPAF Instructions

Reactivate a Job – State Work Study Student Hourly Job

Listed below are Job Details and EPAF Steps to reactivate a state work study student hourly job for a student who has UNC work history – the student is currently working for UNC or has previously worked for UNC.

When to reactivate a job:

- Reactivate a job when the student's job history shows a state work study job with a term date prior to your job start date.
- Reactivating creates a new job by re-using the SAME job number and suffix of a previously termed job.
- Reactivating a job replaces the old job dates and details with NEW job dates and details.

Job Details:

Job Number:	Choose a job of the same type as the job you are hiring: SH9997 State work study hourly
Job Suffix:	00, 01, 02, etc. for academic year or semester jobs
Employee Class Code:	WS (Student Work Study)
Timesheet Orgn:	The Organization code where the employee's time sheet is to be routed for approval
Hourly Rate of Pay:	Must be at least minimum wage but no more than \$15/hour
Job Starting Date:	The first day of the work period that includes the employee's first day of work (PREFERRED) or the actual date the employee begins work No earlier than August 16 th for academic year and semester hourly jobs
Job Ending Date:	The last day of the work period that includes the employee's last day of work No later than May 15 th for academic year and semester hourly jobs
FOAP:	Fund, Organization, Account (see below), Program and optional Activity code for wage expense
Account:	64510 State work study jobs

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.
4. The **Effective Date** defaults to Today's Date. Change the date to the job begin date; date must be in **MM/DD/YYYY** format.
5. Select the Approval Category: **Student Hrly, Reactivate existing job record w/prior term row, SH004**.
6. Screen will display any Active jobs for the student.
7. Click the **All Jobs** button to see both Active and Termed jobs.
8. Screen will display complete job history.
9. Review job history to find the job to be reactivated, using the following criteria:
 - Look for a state work study job (SH9997) with an **End Date** that is prior to the beginning date of your new job;
 - If more than one job meets the criteria, choose the job with the lowest suffix number;
10. If there is not a job that can be reactivated, select the **Approval Category** to **add** an hourly job. (To make this change, click on **Return to EPAF Menu**, then **New EPAF**, and select the new **Approval Category**.)
11. Click the **Go** button.
12. Click the **All Jobs** button again to reveal the radio buttons to the right of the job history details.
13. Select the job to be reactivated by clicking the **Select** radio button on the right side of the job details.
14. Click the **Go** button.
15. The prior job details will appear on the screen under the Current Value column. You will enter your job details under the **New Value** column.
16. Complete the EPAF fields as noted below:
17. **Employee Class Code:** **WS** for work study job. Type in the code or use the magnifying glass to select the code.
18. **Regular Rate:** Type in the hourly rate of pay.
19. **Timesheet Orgn:** The Organization code for time sheet approval. Type in the code or use the magnifying glass to select the code.
20. **FOAP Fields:** Values from the prior job carry forward. Update the work study FOAP line by typing over the values as needed for the current year's funding and **changing the Organization code to your department Organization code**.
 - Effective Date = Defaults from the EPAF Effective Date. **Do not change this date.**
 - COA = Q; do not change this value
 - Index = Not used; leave blank
 - Fund = **Current State Work Study Fund** (the Fund number changes every year)
 - Organization = **Department Organization code**
 - Account = **64510**
 - Program = **Department Program code**

Activity = Not used; **delete any values**

Location, Project, Cost = Not used; leave blank

Percent = **100.00 %**

21. If there is more than one FOAP line, remove the additional line(s).
22. To remove a FOAP line, highlight each FOAP element and Delete the values, including the values in the **COA** and **Percent** fields. Do not space through the values; use the Delete key. Update the **Percent** field as needed so that the total is 100% for the work study FOAP line.
23. **Jobs Effective Date:** This is the job ending date. Date must be in **MM/DD/YYYY** format.
24. **Personnel Date:** Type in the same job ending date (the job ending date is typed in both fields.)
25. Verify **Routing Queue, User Name** fields (second column) contain required default values:
First line, User Name Column = **STUDENTHIRE_APPROVE**
Second line, User Name Column = **HR_APPLIER**
26. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.
27. **Comment.** Required for state work study jobs. Type the FOAP (Fund, Organization, Account, Program and optional Activity codes) for departmental wage expense that is to be used in the event work study funds are depleted.
28. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.
29. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.
30. It will take approximately 24 hours for the job to upload to Banner.
31. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ Warning messages may appear and do not need follow-up action.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Student employee records are inactivated when it has been more than 6 months since their last paycheck. **You will receive an error message when you submit your EPAF if the student's employee record is inactive.** Contact Student Employment at 1-2628 to request the record be reactivated. Once the record is reactivated, you will need to re-submit your EPAF.
- ✓ Contact the Payroll office at 1-2705 for EPAF assistance.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID:

Transaction:

Effective Date: Aug 16, 2019

Transaction Status:

Approval Category: Student Hrly, Reactivate existing job record w/prior term row, SH004

Save

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* - Indicates a required field.

Reactivate existing Stud hrly Job record 2, SH9997-00 Student Wages Work Study, Last Paid Date: May 15, 2019

Item	Current Value	New Value
Job End Date: MM/DD/YYYY*(Not Enterable)	05/15/2019	-
Jobs Effective Date: MM/DD/YYYY*	05/15/2019	08/16/2019
Job Status: *(Not Enterable)	Terminated	A
Job Change Reason: *(Not Enterable)	EJ	BJ
Employee Class Code:	WS, Student Work Study	
Step: *(Not Enterable)	0	
Regular Rate: *		
Factor: *(Not Enterable)	24	24
Pays: *(Not Enterable)	24	24
Timesheet Orgn: *		

FOAP/Percentage change on a new/reactivate job, SH9997-00 Student Wages Work Study, Last Paid Date: May 15, 2019

Current

Effective Date: 09/16/2018

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

Q 30029 64510 100.00

New

Effective Date: MM/DD/YYYY 08/16/2019

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
Q		30029		64510						100.00			
Q													
Q													
Q													
Total:										100.00			

✓ Defaulting values for Labor Distribution from the Job records.

[Default from Index](#) [Save and Add New Rows](#)

End/Terminate Job Record, SH9997-00 Student Wages Work Study, Last Paid Date: May 15, 2019

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	05/15/2019	
Personnel Date: MM/DD/YYYY*	05/15/2019	
Job Status: *(Not Enterable)	Terminated	T
Job Change Reason: (Not Enterable)	EJ	EJ

Routing Queue

Approval Level	User Name	Required Action
84 - (SEAPRV) Student Employment APPROVE	STUDENTHIRE_APPROVE	Studenthire Approve
94 - (HRAPLY) HR Apply	HR_APPLIER	HR Applier
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

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Comment

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Student EPAF Instructions

Reactivate a Job – Student Salary Job

Listed below are Job Details and EPAF Steps to reactivate a student salary job for a student (including a salary job for an international student) who has UNC work history – the student is currently working for UNC or has previously worked for UNC.

When to reactivate a job:

- Reactivate a job when the student's job history shows a student salary job with a term date prior to your job start date **and**
- The suffix number for the termed job matches your work period – academic year or summer.
- Reactivating creates a new job by re-using the SAME job number and suffix of a previously termed job.
- Reactivating a job replaces the old job dates and details with NEW job dates and details.

Job Details:

Job Number:	Choose a job of the same type as the job you are hiring: SS9996 International student salary SS9999 Student salary
Job Suffix:	Choose a job with a suffix that matches your hiring period: 00, 01, 02, etc. for academic year or semester jobs S0, S1, S2, etc. for summer jobs
Timesheet Orgn:	The Organization code where the salary amount is to be entered on the Banner PHATIME screen
Job Starting Date:	The first day of the month during which the employee begins work Student salary jobs must always start on the first day of a month. Summer jobs begin on the first day of May, June, July, or August
Job Ending Date:	The last day of the month during which the employee completes work Student salary jobs must always end on the last day of a month. Academic year and semester jobs must end by May 31 st Summer jobs must end by August 31 st
FOAP:	Fund, Organization, Account (see below), Program and optional Activity codes for wage expense

Account Code:	64120	Academic year and semester jobs
	64125	Summer jobs

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.
4. The **Effective Date** defaults to Today's Date. Change the date to the job begin date; date must be in **MM/DD/YYYY** format.
5. Select the Approval Category: **Student Sal., Reactivate existing job record w/prior term row, SS004**.
6. Screen will display any Active jobs for the student.
7. Click the **All Jobs** button to see both Active and Termed jobs.
8. Screen will display complete job history.
9. Review job history to find the job to be reactivated, using the following criteria:
 - Choose the job that has a position number and suffix combination that matches your job;
 - The job selected for reactivation must have an **End Date** that is prior to the beginning date of your new job;
 - If more than one job meets the criteria, choose the job with the lowest suffix number;
 - **Remember:** if you are hiring for a summer job you must choose a job with a summer suffix.
10. If there is not a job that can be reactivated, you will need to use the **Approval Category** to add a salary job. (To make this change, click on **Return to EPAF Menu**, then **New EPAF** and select the new **Approval Category**.)
11. Click the **Go** button
12. Click the **All Jobs** buttons again to reveal the radio buttons to the right of the job history details.
13. Select the job to be reactivated by clicking the **Select** radio button on the right side of the job details.
14. Click the **Go** button.
15. The prior job details will appear on the screen under the Current Value column. You will enter the new job details under the **New Value** column.
16. Complete the EPAF fields as noted below.
17. **Timesheet Orgn:** The Organization code where the salary amount is to be entered on the Banner PHATIME screen. Type in the code or use the magnifying glass to select the code.

18. **FOAP Fields:** Values from the prior job carry forward. **Type over these values with your FOAP for wage expense.**

Effective Date = Defaults from the EPAF Effective Date. **Do not change this date.**

COA = Q; do not change this value

Index = Not used; leave blank

Fund = Fund code; if the Fund includes a letter, use a capital letter

Organization = Organization code

Account = Account code:

64120 for academic year or semester jobs

64125 for summer jobs

Program = Program code

Activity = Activity code; optional; use capital letter(s) if part of code

Location, Project, Cost = Not used; leave blank

Percent = 100.00 % (or change if adding additional FOAP lines as noted below)

19. Additional FOAP lines can be added if needed (up to a total of 5 lines). The **COA** field must be completed for each line; change the **Percent** on each line so that the total is 100% for all lines.
20. To remove a FOAP line, highlight each FOAP element and delete the values, including the values in the **COA** and **Percent** fields. Do not space through the values; use the Delete key. Update the **Percent** field as needed so that the total is 100% for all lines.
21. **Jobs Effective Date:** This is the job ending date. Date must be in **MM/DD/YYYY** format.
22. **Personnel Date:** Type in the same job ending date (the job ending date is typed in both fields.)
23. Verify **Routing Queue, User Name** fields (second column) contain required default values:
- First line, User Name Column = **STUDENTHIRE_APPROVE**
- Second line, User Name Column = **HR_APPLIER**
24. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.
25. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.
26. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.
27. It will take approximately 24 hours for the job to upload to Banner.
28. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ Warning messages may appear and do not need follow-up action.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Student employee records are inactivated when it has been more than 6 months since their last pay check. **You will receive an error message when you submit your EPAF if the student's employee record is inactive.** Contact Student Employment at 1-2628 to request the record be reactivated. Once the record has been reactivated, you will need to re-submit your EPAF.
- ✓ Contact the Payroll office at 1-2705 for EPAF assistance.

- ✓ Salary amounts are not entered when the EPAF is set up. Salary amounts are entered using the Banner PHATIME screen for the specific payroll that corresponds to the completion of the work or agreed upon pay date.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID:

Transaction:

Effective Date: Dec 01, 2016

Transaction Status:

Approval Category: Student Sal., Reactivate existing job record w/prior term row, SS004

Save

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* - indicates a required field.

Reactivate existing Student SALARY job record, SS9999-00 Student Salaried, Last Paid Date: Feb 15, 2016

Item	Current Value	New Value
Job End Date: MM/DD/YYYY* (Not Enterable)	05/31/2016	-
Jobs Effective Date: MM/DD/YYYY*	05/31/2016	12/01/2016
Job Status: *(Not Enterable)	Terminated	A
Employee Class Code: *(Not Enterable)	SS, Student Salary	SS
Job Change Reason: *(Not Enterable)	EJ	B3
Step: *(Not Enterable)	0	0
Regular Rate: *(Not Enterable)	0	0
Factor: *(Not Enterable)	24	24
Pays: *(Not Enterable)	24	24
Timesheet Orgn: *		

FOAP/Percentage change on a new/reactivate job, SS9999-00 Student Salaried, Last Paid Date: Feb 15, 2016

Current

Effective Date: 12/01/2015

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

Q 100.00

New

Effective Date: MM/DD/YYYY 12/01/2016

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
Q		Q	Q	Q 64120	Q	Q	Q	Q		100.00			
Q		Q	Q	Q	Q	Q	Q	Q					
Q		Q	Q	Q	Q	Q	Q	Q					
Q		Q	Q	Q	Q	Q	Q	Q					
Q		Q	Q	Q	Q	Q	Q	Q					
Total:										100.00			

✓ Defaulting values for Labor Distribution from the Job records.

[Default from Index](#) | [Save and Add New Rows](#)

End/Terminate Job Record, SS9999-00 Student Salaried, Last Paid Date: Feb 15, 2016

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	05/31/2016	
Personnel Date: MM/DD/YYYY*	05/31/2016	
Job Status: *(Not Enterable)	Terminated	T
Job Change Reason: (Not Enterable) EJ		EJ

Routing Queue

Approval Level	User Name	Required Action
84 - (SEAPRV) Student Employment APPROV	STUDENTHIRE_APPROVE	Studenthire Approve
94 - (HRAPLY) HR Apply	HR_APPLIER	HR Applier
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

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Comment

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Student EPAF Instructions

Pay Rate Change - Student Hourly Job

Listed below are Job Details and EPAF Steps to change the hourly rate of pay on a student hourly job, including federal and state work study jobs and jobs for international students.

In this EPAF, you will enter new rate of pay TWICE and will also re-enter the job's current ending date.

Job Details:

Job Number:	Choose the position number from the student's job history:
	SH9996 International student hourly
	SH9997 State work study hourly
	SH9998 Federal work study hourly
	SH9999 Student hourly, non-work study
Job Suffix:	Suffixes for academic year and semester jobs are two numbers Suffixes for summer jobs begin with the letter S
Effective Date:	The first day of the work period during which the change is effective (preferred date) or the actual effective date of the change Must be after the Last Paid Date as displayed in the EPAF Hours worked prior to the Effective Date will be at the old rate Hours worked beginning with the Effective Date will be at the new rate
Hourly Rate of Pay:	Must be at least minimum wage but no more than \$15/hour

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.
4. The **Effective Date** defaults to Today's Date. Change the date to the effective date of the rate change; date must be in **MM/DD/YYYY** format.
5. Select the Approval Category: **Change Pay Rate for any hourly worker, CHGPAY**.
6. Screen will display all Active jobs for the student.
7. Click the **Go** button.
8. Select the job to be changed by clicking the **Select** radio button on the right side of the job details.
9. Click the **Go** button.

10. The current job details will appear on the screen under the Current Value column. You will enter values under the **New Value** column.
11. Complete the EPAF fields as noted below.
12. **Regular Rate:** Type in the new hourly rate of pay.
13. **Jobs Effective Date:** This is the original **Job End Date** as displayed under the **Item** column under the heading **Removes the termination row only...** near the top of the EPAF. Do not use a different job ending date; type in the original job ending date. Date must be in **MM/DD/YYYY** format.
14. **Personnel Date:** Type in the same job ending date (the job ending date is typed in both fields.)
15. **Regular Rate:** Type in the new hourly rate of pay again (the rate is typed in twice in this EPAF.)
16. Verify **Routing Queue, User Name** fields (second column) contain required default values:
First line, User Name Column = **STUDENTHIRE_APPROVE**
Second line, User Name Column = **HR_APPLIER**
17. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.
18. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.
19. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.
20. It will take approximately 24 hours for the job change to upload to Banner.
21. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ A warning message will appear related to the future job ending date. No action is needed for this warning message.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Contact the Payroll office at 1-2705 for EPAF assistance.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID:
Transaction: Effective Date: Mar 01, 2017
Transaction Status:
Approval Category: Change Pay Rate for any hourly worker, CHGPAY

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* - Indicates a required field.

Removes the termination row only, SH9999-00 Student Wages Non-Work Study, Last Paid Date: Feb 28, 2017

Item	Current Value	New Value
Job End Date: MM/DD/YYYY* (Not Enterable)	05/15/2017	<input type="text"/>

The last time the employee was paid in this job was 02/28/2017. The rate change must be effective after this date.

Change Hourly Pay Rate for hourly worker, SH9999-00 Student Wages Non-Work Study, Last Paid Date: Feb 28, 2017

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	08/16/2016	<input type="text"/>
Job Change Reason: *(Not Enterable) BJ		<input type="text"/>
Regular Rate: *		<input type="text"/>

End/Terminate Job Record, SH9999-00 Student Wages Non-Work Study, Last Paid Date: Feb 28, 2017

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	08/16/2016	<input type="text"/>
Personnel Date: MM/DD/YYYY*	08/16/2016	<input type="text"/>
Regular Rate: *		<input type="text"/>
Job Status: (Not Enterable)	Active	<input type="text"/>
Job Change Reason: (Not Enterable) BJ		<input type="text"/>

The job ending date as noted above is 05/15/2017.

Routing Queue

Approval Level	User Name	Required Action
84 - (SEAPRV) Student Employment APPROV	STUDENTHIRE_APPROVE	Approve
94 - (HRAPLY) HR Apply	HR_APPLIER	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Comment

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Student EPAF Instructions

FOAP Change – Student Hourly or Salary Job

Listed below are Job Details and EPAF Steps to change the FOAP – Fund, Org, Account, Program and optional Activity codes on a student hourly or salary job.

Job Details:

Job Number:	Choose the position number from the student's job history:
	SH9996 International student hourly
	SH9997 State work study hourly
	SH9998 Federal work study hourly
	SH9999 Student hourly, non-work study
	SS9996 International student salary
	SS9999 Student salary
Job Suffix:	Suffixes for academic year and semester jobs are two numbers Suffixes for summer jobs begin with the letter S
Effective Date:	Hourly Jobs: Use the first day of the work period during which the change is effective Salary Jobs: Always use the first day of a month All Jobs: Must be after the Last Paid Date as displayed in the EPAF Wage expense prior to the Effective Date will be charged to the old FOAP; wage expense beginning with the Effective Date will be charged to the new FOAP
FOAP:	Fund, Organization, Account, Program and optional Activity codes for wage expense

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.

4. The **Effective Date** defaults to Today's Date. Change the date to the new job ending date; date must be in **MM/DD/YYYY** format.
5. Select the Approval Category: **Change FOAP and/or Labor Dist. Percentage, FOAP.**
6. Screen will display all Active jobs for the student.
7. Click the **Go** button.
8. Select the job to be changed by clicking the **Select** radio button on the right side of the job details.
9. Click the **Go** button.
10. The current job details will appear on the screen under the Current Value column.
11. Complete the EPAF fields as noted below.
12. **FOAP Fields:** The current job FOAP is displayed under the Current heading. You will change the FOAP fields under the **New** heading.
13. Type over the FOAP elements to be changed or add/remove FOAP lines.
 - Effective Date = Defaults from the EPAF Effective Date. **Do not change this date.**
 - COA = Q; do not change this value
 - Index = Not used; leave blank
 - Fund = Fund code; if the Fund includes a letter, use a capital letter
 - Organization = Organization code
 - Account = Account code (see table below)
 - Program = Program code
 - Activity = Activity code; optional; use capital letter(s) if part of code
 - Location, Project, Cost = Not used; leave blank
 - Percent = 100.00 % (or change if adding additional FOAP lines as noted below)
14. **Do not change values on work study FOAP lines unless instructed by Student Employment.**
15. If adding or removing a FOAP on a federal work study job, make sure that the department's wage expense remains at the required percentage.
16. Additional FOAP lines can be added if needed (up to a total of 5 lines). The **COA** field must be completed for each line; change the **Percent** on each line so that the total is 100% for all lines.
17. To remove a FOAP line, highlight each FOAP element and delete the values, including the values in the **COA** and **Percent** fields. Do not space through the values; use the Delete key. Update the **Percent** field as needed so that the total is 100% for all lines.
18. Verify **Routing Queue, User Name** fields (second column) contain required default values:
 - First line, User Name Column = **STUDENTHIRE_APPROVE**
 - Second line, User Name Column = **HR_APPLIER**
19. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.
20. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.
21. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.
22. It will take approximately 24 hours for the job change to upload to Banner.

23. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ A warning message will appear related to the future job ending date. No action is needed for this warning message.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Contact the Payroll office at 1-2705 for EPAF assistance.

Account Codes:

Position	Position Number	Account Code
Non-Work Study Student Hourly	SH9999	64110
Student Salary	SS9999	64120
International Student Hourly	SH9996	64110
International Student Salary	SS9996	64120
State Work Study Hourly	SH9997	64510
Federal Work Study Hourly	SH9998	64410
Summer Student Hourly	SH9999	64115
Summer Student Salary	SS9999	64125
Summer International Student Hourly	SH9996	64115
Summer International Student Salary	SS9996	64125

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID:

Transaction:

Transaction Status:

Approval Category: Change FOAP and/or Labor Dist. Percentage, FOAP

Save

Effective Date: Mar 01, 2017

Last Paid Date: Dec 15, 2015

The last time the employee was paid in this job was 12/15/2015. The FOAP change must be effective after this date.

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* - indicates a required field.

FOAP/Percentage change on Active Job, SH9999-00 Student Wages Non-Work Study

Item Current Value New Value

Jobs Effective Date: MM/DD/YYYY 02/21/2017 03/01/2017

Job Change Reason: (Not Enterable) BJ FOAP

Personnel Date: MM/DD/YYYY 02/21/2017 03/01/2017

Current

Effective Date: 02/21/2017

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

Q 64110 100.00

New

Effective Date: MM/DD/YYYY 03/01/2017

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
Q				64110						100.00	
Total:										100.00	

Defaulting values for Labor Distribution from the Job records.

[Default from Index](#) [Save and Add New Rows](#)

Routing Queue

Approval Level

84 - (SEAPRV) Student Employment APPROV

94 - (HRAPLY) HR Apply

Not Selected

Not Selected

Not Selected

Not Selected

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User Name

STUDENTHIRE_APPROVE

HR_APPLIER

Not Selected

Not Selected

Not Selected

Not Selected

Studenthire Approve

HR Applier

Not Selected

Not Selected

Not Selected

Not Selected

Required Action

Approve

Apply

Not Selected

Not Selected

Not Selected

Not Selected

Comment

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Save

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Student EPAF Instructions

Timesheet Orgn Change – Student Hourly or Salary Job

Listed below are Job Details and EPAF Steps to change the Timesheet Organization code on a student hourly or salary job.

In this EPAF, you will enter the new Timesheet Organization code and re-enter the job's current ending date.

NOTE: When the timesheet organization code is changed, a new time sheet for the work period is created. If the student has already extracted their timesheet for this work period, the student will need to re-enter their hours on the new time sheet. **Please contact the Payroll office at 1-2700 for assistance in verifying a student's timesheet when changing the Timesheet Orgn.**

Job Details:

Job Number:	Choose the position number from the student's job history:
	SH9996 International student hourly
	SH9997 State work study hourly
	SH9998 Federal work study hourly
	SH9999 Student hourly, non-work study
	SS9996 International student salary
	SS9999 Student salary
Job Suffix:	Suffixes for academic year and semester jobs are two numbers Suffixes for summer jobs begin with the letter S
Effective Date:	Use the first day of the work period during which the change is effective Must be after the Last Paid Date as displayed in the EPAF
Timesheet Orgn:	For hourly jobs: the Organization code where the time sheet is to be routed for approval For salary jobs: the Organization code where the salary is to be entered on the Banner PHATIME screen

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.

4. The **Effective Date** defaults to Today's Date. Change the date to the effective date of the change; date must be in **MM/DD/YYYY** format.
5. Select the Approval Category: **Change Timesheet Org, TSORG**.
6. Screen will display all Active jobs for the student.
7. Click the **Go** button.
8. Select the job to be changed by clicking the **Select** radio button on the right side of the job details.
9. Click the **Go** button.
10. The current job details will appear on the screen under the Current Value column. You will enter values under the **New Value** column.
11. Complete the EPAF fields as noted below.
12. **Timesheet Orgn:** Type in the new timesheet organization code. If the code includes a letter, use a capital letter.
13. **Jobs Effective Date:** This is the original **Job End Date** as displayed under the **Item** column under the heading **Removes the termination row only...** near the top of the EPAF. Do not use a different job ending date; type in the original job ending date. Date must be in **MM/DD/YYYY** format.
14. **Personnel Date:** Type in the same job ending date (the job ending date is typed in both fields.)
15. Verify **Routing Queue, User Name** fields (second column) contain required default values:
First line, User Name Column = **STUDENTHIRE_APPROVE**
Second line, User Name Column = **HR_APPLIER**
16. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.
17. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.
18. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.
19. It will take approximately 24 hours for the job change to upload to Banner.
20. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ A warning message will appear related to the future job ending date. No action is needed for this warning message.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Contact the Payroll office at 1-2705 for EPAF assistance.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: _____
Transaction: _____ **Effective Date:** Mar 01, 2017
Transaction Status: _____
Approval Category: Change Timesheet Org, TSORG

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* - Indicates a required field.

Removes the termination row only, SH9999-01 Student Wages Non-Work Study, **Last Paid Date: Feb 15, 2017**

Item	Current Value	New Value
Job End Date: MM/DD/YYYY* (Not Enterable)	05/15/2017	-

The last time the employee was paid in this job was 02/15/17. The Timesheet Orgn change must be effective after this date.

Change Timesheet Org, SH9999-01 Student Wages Non-Work Study, Last Paid Date: Feb 15, 2017

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	01/28/2017	03/01/2017
Job Change Reason: *(Not Enterable) BJ		TSORG
Timesheet Orgn: *		<input type="text"/>

End/Terminate Job Record, SH9999-01 Student Wages Non-Work Study, Last Paid Date: Feb 15, 2017

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	01/28/2017	<input type="text"/>
Personnel Date: MM/DD/YYYY*	01/28/2017	<input type="text"/>
Job Status: *(Not Enterable)	Active	<input type="text"/>
Job Change Reason: (Not Enterable) BJ		<input type="text"/>

The job ending date as noted above is 05/15/2017.

Routing Queue

Approval Level	User Name	Required Action
84 - (SEAPRV) Student Employment APPROV	STUDENTHIRE_APPROVE	Approve
94 - (HRAPLY) HR Apply	HR_APPLIER	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Comment

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Student EPAF Instructions

Term a Job – Student Hourly or Salary Job

Listed below are Job Details and EPAF Steps to change the ending date on a student hourly or salary job.

Do not use EPAF for involuntary terminations. Please call the Payroll office at 1-2700 for all involuntary job terminations.

Job Details:

Job Number: Choose the position number from the student's job history:

SH9996	International student hourly
SH9997	State work study hourly
SH9998	Federal work study hourly
SH9999	Student hourly, non-work study

SS9996	International student salary
SS9996	Student salary

Job Suffix: Suffixes for academic year and semester jobs are two numbers
Suffixes for summer jobs begin with the letter S

Effective Date: Hourly Jobs:
Last day of the work period during which student completed work
(preferred) **or** actual last day of work

Salary Jobs:
Last day of the month during which student completed work
Always use the last day of a month

All Jobs:
Must be after the Last Paid Date as displayed in the EPAF

Check the employee's time sheet to make sure the new job ending date
is not prior to the employee's last day of work

EPAF Steps:

1. Log in to Ursa, click on the Employee Tab and the link for **Electronic Personnel Action Forms (EPAF)**.
2. Select **New EPAF**.
3. Type in student's Bear ID and **Tab** to populate the student's name.
4. The **Effective Date** defaults to Today's Date. Change the date to the effective date of the rate change; date must be in **MM/DD/YYYY** format.

5. Select the Approval Category: **Terminate job record for EE no longer working, TERMJB.**
6. Screen will display all Active jobs for the student.
7. Click the **Go** button.
8. Select the job to be termed by clicking the **Select** radio button on the right side of the job details.
9. Click the **Go** button.
10. The Effective Date of the EPAF becomes the new job ending date. There are no job detail fields to complete.
11. Verify **Routing Queue, User Name** fields (second column) contain required default values:
First line, User Name Column = **STUDENTHIRE_APPROVE**
Second line, User Name Column = **HR_APPLIER**
12. If values are missing or not as noted above, use the magnifying glass to select the required values. If updating these fields, click the **Save and Add New Rows** button just below the Routing Queue area.
13. Click the **Save** button under the Comment box. Look for the **green check mark** at the top of the EPAF indicating the transaction was saved successfully.
14. Click the **Submit** button at the top of the EPAF. Look for the **green check mark** indicating the transaction was submitted successfully. The status of the EPAF will be **Pending**.
15. It will take approximately 24 hours for the job change to upload to Banner.
16. Use the **EPAF Originator Summary** to check the status of the EPAF. Check the **Current** Tab daily to make sure the EPAF has not been returned for correction. Check the **History** Tab daily until the EPAF status shows **Completed**.

Notes:

- ✓ A warning message will appear related to the future job ending date. No action is needed for this warning message.
- ✓ **Error messages must be resolved before your EPAF can be processed.**
- ✓ Contact the Payroll office at 1-2705 for EPAF assistance.

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID:

Transaction:

Effective Date: Mar 31, 2017

Transaction Status:

Last Paid Date: Feb 28, 2017

Approval Category: Terminate job record for EE no longer working, TERMJB

The last time the employee was paid in this job was 02/28/17. The new job ending date must be 02/28/2017 or later.

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* - indicates a required field.

Terminate job record with an effective date, SH9999-01 Student Wages Non-Work Study, Last Paid Date: Nov 15, 2016

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	01/01/2017	<input type="text" value="03/31/2017"/>
Personnel Date: MM/DD/YYYY*	01/01/2017	<input type="text" value="03/31/2017"/>
Job Status: *(Not Enterable)	Active	<input type="text" value="T"/>
Job Change Reason: *(Not Enterable)	<input type="text"/>	<input type="text" value="OTHER"/>

These values default; no entry is needed.

Routing Queue

Approval Level	User Name	Required Action
84 - (SEAPRV) Student Employment APPROV	<input type="text" value="STUDENTHIRE_APPROVE"/>	Studenthire Approve <input type="button" value="Approve"/>
94 - (HRAPLY) HR Apply	<input type="text" value="HR_APPLIER"/>	HR Applier <input type="button" value="Apply"/>
Not Selected	<input type="text"/>	Not Selected <input type="button" value="Not Selected"/>
Not Selected	<input type="text"/>	Not Selected <input type="button" value="Not Selected"/>
Not Selected	<input type="text"/>	Not Selected <input type="button" value="Not Selected"/>
Not Selected	<input type="text"/>	Not Selected <input type="button" value="Not Selected"/>

Comment

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