

EPAF

Electronic Personnel Actions Form

User Guide for Student EPAFs

Student Hourly and Salary jobs

Contacts for EPAF Assistance:

Payroll Department, 1-2705 or 1-2700
Student Employment Department, 1-2628
Human Resources, 1-2718

EPAF training videos and printed training materials are available on the Payroll web site under the Procedures link, EPAF Training & Helps.

One-on-one training at your location is available by contacting Dorothy Swenson, 1-2705.

For questions about EPAF security access, contact Sue Swanson, Payroll Department, at 1-2946.

EPAF Security Access:

Banner and Banner Self Service security access is required based on the role you play in the process of setting up student jobs and paying students:

EPAF Originator:

- Uses EPAF to set up jobs and make changes to existing jobs.
- An EPAF Originator can also approve time sheets through Web Time Entry.
- An EPAF Originator can be a proxy for a time sheet approver.

Time Keeper:

- Enters student salary payments (and leave hours) on the Banner PHATIME screen.
- Does not use EPAF.
- Does not approve time sheets through Web Time Entry.

Requesting Security Access:

1. Complete the HR/Payroll Security Access form using the OnBase process on the IMT website.
2. Check the EPAF Originator box under HR/Payroll needs.
3. You will be notified by email from Sue Swanson in payroll when your access has been set up.
4. Training resources are available on the payroll website. One-on-one training is also available by contacting Dorothy Swenson in payroll at 1-2705.

EPAF Actions - Approval Categories

Set up a Student Hourly Job: Non-work study, work study, international student hourly	
New Hire – No UNC Work History SH001	To set up an hourly job for a student who has never worked at UNC – has no job history in EPAF or in Banner system.
Add an Hourly Job SH002	To set up an hourly job for a student who has work history – is currently working at UNC or has worked in the past – but who doesn't have a previous hourly job that can be reactivated (re-used).
Reactivate an Hourly Job SH004	To set up an hourly job for a student who has work history – AND has a previous hourly job that can be re-used. Reactivating creates a new job by re-using the SAME job number and suffix and replaces the old job dates and details with NEW job dates and details.
Set Up a Student Salary Job:	
New Hire – No UNC Work History SS001	To set up a salary job for a student who has never worked at UNC – has no job history in EPAF or in Banner system.
Add a Salary Job SS002	To set up a salary job for a student who has work history – is currently working at UNC or has worked in the past – but who doesn't have a previous salary job that can be reactivated (re-used).
Reactivate a Salary Job SS004	To set up a salary job for a student who has work history – AND has a previous salary job that can be re-used. Reactivating creates a new job by re-using the SAME job number and suffix and replaces the old job dates and details with NEW job dates and details.
Other Job Actions for Student Hourly and Salary Jobs:	
Change Hourly Rate of Pay CHGPAY	To change the rate of pay on an hourly job. New rate must be at least minimum wage and no more than \$15/hour.
Change FOAP FOAP	To change one or more of the FOAP elements on a job – Fund, Org, Account, Program, Activity codes. The FOAP is where wage expense is charged. Also used to add an additional FOAP line (up to 5 lines are allowable), change the percentage of a FOAP split or remove a FOAP line.
Change Timesheet Org TSORG	To change the Timesheet Organization code on an hourly or salary job. The Timesheet Org determines where the employee's time sheet is routed for approval and is also used for entering salary amounts on the Banner PHATIME screen.
Term Job TERMJB	To change the original ending date on a job to a new ending date. The new ending date must always be after the job's Last Paid Date. Do not use for involuntary job terminations. Call the Payroll office at 1-2700 for all involuntary terminations.

Helpful Hints for Approval Categories:

- If you are unsure of the Approval Category to select, start with the one you think is the best.
- Once you have selected a Category, a list of the student's currently active jobs is displayed. Click the **All Jobs** button to see the full job history, including all active and previously termed jobs.
- Choose a different Approval Category if needed, based on the job history.
- Once you have clicked the **Go** button, you cannot change the Approval Category. You will need to start a **New EPAF** if you need to use a different Approval Category than the one you originally selected.

EPAF Effective Dates:

Setting Up Jobs – New, Additional and Reactivated Jobs Hourly and Salary	
Academic Year or Semester Jobs	
Job Start Date	
Hourly	First day of work period during which student begins work No earlier than August 16 th for academic jobs
Salary	Must always be the first day of a month Use first day of the month during which student begins work
Job End Date	
Hourly	Last day of work period during which student ends work No later than May 15 th
Salary	Must always be the last day of a month Use last day of the month during which student completes work
Summer Jobs	
Job Start Date	
Hourly	First day of work period during which student begins work No earlier than May 16 th
Salary	Must always be the first day of a month May 1, June 1, July 1, or August 1
Job End Date	
Hourly	Last day of summer work period during which student ends work No later than August 15 th
Salary	Must always be the last day of a month May 31, June 30, July 31 or August 31
Other Job Actions For Hourly and Salary Jobs	
Effective Date	
Hourly Rate Change	First day of the work period that includes the effective date (preferred) OR actual effective date of the change Must be after job's Last Paid Date
Change FOAP	Use the first day of the work period that includes the effective date of the change Must be after job's Last Paid Date
Change Timesheet Org	Use the first day of the work period that includes the effective date of the change Must be after job's Last Paid Date Please notify Payroll when making a Timesheet Org change
Term Job	The last day of the work period during which student completed work (preferred) OR the actual last day of work Can be the same as job's Last Paid Date or can be after the job's Last Paid Date Contact Payroll if student did not work at all in job; Payroll will remove job from Banner Contact Payroll for all involuntary job terminations

Helpful Hints for EPAF Effective Dates:

- The Effective Date of the EPAF becomes the Job Begin Date or the Effective Date of a change.
- The Effective Date defaults to Today's Date. You will usually need to change this date.
- EPAF dates must always be entered in MM/DD/YYYY format.

Position Numbers and Suffixes:

Position Numbers	
Student Hourly	SH9999
Student Salary	SS9999
International Student Hourly	SH9996
International Student Salary	SS9996
State Work Study Hourly	SH9997
Federal Work Study Hourly	SH9998

Suffixes
Academic Year or Semester:
00, 01, 02, etc.
Summer: S0, S1, S2, etc.

Helpful Hints for Position Numbers and Suffixes:

- Job suffixes are used to distinguish one job from another.
- Suffixes are two characters.
- Academic year and semester jobs use suffixes with 2 numbers (00, 01, 02, etc.)
- Summer jobs use a suffix that begins with 'S' followed by a number (S0, S1, S2, etc.)

Account Codes:

Position	Position Number	Account Code
Hourly, Non-Work Study	SH9999	64110
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**
**Code may vary; use the account code requested by Student Employment.		
Summer Student Hourly	SH9999	64115
Summer Student Salary	SS9999	64125
Summer International Student Hourly	SH9996	64115
Summer International Student Salary	SS9996	64125

Logging into EPAF:

After logging in to Ursa, follow these steps to access EPAF:

1. Click on the Employee Tab
2. Click on the link for **Electronic Personnel Action Forms (EPAF)**

Starting an EPAF:

1. Select **New EPAF**.
2. Enter the Student's Bear Number in the **ID** field.
3. Tab to display the student's name.
4. Enter the **Effective Date** of the EPAF in MM/DD/YYYY format (date defaults to Today's Date).
5. Select the **Approval Category** from the drop down menu.
6. All **Active** jobs will be displayed automatically.
7. Click the **All Jobs** button.
8. The complete job history for the student will be displayed, both **Active** and **Termed** (previous) jobs.
9. Verify you have the correct **Approval Category** by reviewing the student's job history.
10. Select a different **Approval Category** if needed. Follow steps 7 – 9 above.
11. Once you have the correct **Approval Category** and **Effective Date** – click the **Go** button.
12. Click the **All Jobs** button again to select the job to be changed or reactivated and to display the **New Job** field.
13. Enter the position number and suffix for a new job or click the **Select** button next to the job to change or reactivate.
14. Click the **Go** button to proceed with the EPAF.
15. To start over, click on the link **Return to the EPAF Menu** at the bottom of the page.

Submitting the EPAF:

1. Click the **Save** button. The cursor will pop up to the top of the screen and return a green checkmark with the message that the EPAF was saved successfully. Status is **Waiting**.
2. Click the **Submit** button. A green checkmark will appear with the message that the EPAF was submitted successfully. Status is **Pending**.
3. EPAFs at a **Pending** status are ready for Student Employment to review and approve.
4. **If you receive an Error message**, the Approval Category may not be correct, data within the EPAF is not correct **OR** the student has not worked for 6 months or more and their employee record is now inactive. Error messages require action before the EPAF can be processed.

Warnings and Error Messages:

Warnings:

- Warning messages will appear related to Budget, Encumbrances and FTE. No action is needed for these warnings as they pertain to features not currently used for student jobs.
- When changing a job ending date or an hourly rate of pay, a warning message related to future changes will appear. These warnings are informational and will not prevent your EPAF from being approved.

Error Messages:

- All Error messages need to be resolved before your EPAF can be processed.
- The most common Error messages relate to incorrect Approval Category, the Effective Date of the EPAF, or students whose employee record has been inactivated because it has been more than six months since they were last paid.

To correct Error Messages:

Did you select the wrong Approval Category?

If so, Delete or Void the EPAF and start a new one using the correct Approval Category.

Did you use the wrong Effective Date?

If so, Delete or Void the EPAF and start a new one with the correct Effective Date.

Has the student's employee record been inactivated?

- You may need a new I-9. Confirm this by looking at the Last Paid Date. If it has been more than one year since the employee was last paid, a new I-9 is needed.
- If it has been less than one year since the employee was last paid, a new I-9 is not needed. Student Employment can re-activate the employee record. Contact Student Employment at 1-2628 and request the student record be reactivated.
- Once the student record has been reactivated, re-submit your EPAF using the **EPAF Originator Summary**.

Use the EPAF Originator Summary to Check EPAF Status:

1. Log into EPAF.
2. Click on EPAF Originator Summary.
3. Check the Current and History Tabs of the EPAF Originator Summary daily until your EPAF shows a **Completed** status.

Current Tab:

- Displays EPAFs that require action by you as the originator.
- EPAFs displayed will be at a Waiting or Return for Correction status.
- Check this Tab daily until there are no EPAFs displayed.
- View the Comments added to your EPAF. They contain instructions on how to proceed.

History Tab:

- EPAFs displayed will be at a Pending or Completed status.
- Displays EPAFs that have been submitted by you as the originator and are ready for Student Employment to review and approve (Pending status.)
- Also displays EPAFs that are completed, which means job information has been uploaded to the Banner system.
- Check this Tab daily until your new EPAFs show a Completed status.
- EPAFs at a Void or Cancelled status will also appear in this tab.

When the EPAF is at a Completed Status:

- The student's job has been uploaded to the Banner system.
- The job change has been uploaded to the Banner system.
- A time sheet is created for an hourly job.
- Student salary amounts can be entered on the Banner PHATIME screen.

Updating an EPAF at a Waiting or Return for Correction Status:

1. Log into EPAF.
2. Click on EPAF Originator Summary.
3. Click on the **Current** Tab.
4. Open the EPAF by clicking on the student's name.
5. If voiding the EPAF, click the **Void** button. Complete a new EPAF if needed.
6. If deleting the EPAF, click the **Delete** button. Complete a new EPAF if needed.
7. If not voiding or deleting the EPAF, click the **Update** button and make changes to the EPAF data as needed. Then **Save** and **Submit** the EPAF.
8. Verify the EPAF status changes to **Pending** and the green checkmark is displayed.
9. Check the EPAF Originator Summary Current and History Tabs daily until your EPAF shows a Completed status.

Helpful hints:

1. Gather all job information before starting an EPAF.
2. Use the Student Employment Work Authorization and EPAF Entry Form.
3. Work Study Authorization provides information on work study award.
4. Student's work history at UNC can be viewed using Banner screen NBIJLST and also using the All Jobs button in EPAF.
5. Hourly rate of pay must be at least minimum wage and no more than \$15/hour.
6. Timesheet Org is for the time sheet approver or salary to be entered in Banner PHATIME.
7. FOAP (Fund-Org-Account-Program-Optional Activity) is for wage expense.
8. Work periods are: 1st – 15th of month and 16th – last day of month.
9. **New I-9 is needed if the student previously worked for UNC and has not been paid within the past 12 months**.
10. Student Salary Time Sheet form provides information needed for student salary payments, which are entered separately from the EPAF process. This form can be found on the Payroll website under the Forms link.

Student Employment Work Authorization and EPAF Entry Form:

- This form serves as the agreement between the University and the student employee.
- Contains information needed for the EPAF.
- Hiring department retains on file for 2 years from the date of hire.
- Form is located on the Payroll Website under the Forms link.

Default Routing Queue Set-up:

- Routing Queues are used for EPAF approval and uploading of EPAF information to the Banner system.
- Two Queues are used: one for approval of EPAFs and one for uploading (Applying) EPAF information to the Banner system.
- Routing Queue fields must be completed in each EPAF so that the transaction can be approved and applied.
- Default values for these Routing Queue fields can be set up before hand, so that information will automatically populate these fields in each new EPAF.

Follow these steps to set up the default values for EPAF Routing Queues:

1. From the EPAF main menu, click on **EPAF Originator Summary**.
2. Click on the link for **Default Routing Queue**.
3. Select the first **Approval Category** from the drop down menu (Change FOAP and/or Labor Dis. Percentage, FOAP).
4. Click the **Go** button.
5. Click on the Magnifying Glass icon on the first line under User Name, next to **84 – (SEAPRV) Student Employment APPROVE**.
6. A **Valid Values** window will open.
7. Highlight the displayed value: **Approve, Studenthire (STUDENTHIRE_APPROVE)**.
8. Click the **Select** button.
9. Click on the Magnifying Glass icon on the second line under User Name, next to **94 – (HRAPLY) HR Apply**.
10. A **Valid Values** window will open.
11. Highlight the value: **Applier, HR (HR_APPLIER)**.
12. Click the **Select** button.
13. Click the **Save and Add New Rows** button.
14. A **green check mark** will appear indicating your change was saved successfully.
15. Select the next **Approval Category** from the drop down menu (Change Pay Rate for any hourly worker, CHGPAY).
16. Click the **Go** button.
17. Follow steps 5 – 14 above.
18. Repeat the above steps for each of the Approval Categories (for all 10 Approval Categories.)
19. Remember to click the **Go** button after selecting the next **Approval Category**.
20. Default Values for Routing Queues will now be in place for all of your future EPAFs.