

# **BANNERHUMANRESOURCES**

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## **ELECTRONIC PERSONNEL ACTION FORMS USER MANUAL FOR DEPARTMENTAL STAFF**



### **Banner HR Electronic Personnel Action Forms December 2016**



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## INTRODUCTION TO ELECTRONIC PERSONNEL ACTION FORMS

Electronic Personnel Action Forms are formatted screens in UNCGenie where the departmental user enters the critical data necessary to complete the NBAJOBS form in INB Banner HR, which then becomes an active pay record. EPAFs can also be designed to change information on the PPAIDEN (personal, biographical information) and the PEAEMPL (employee designation information) forms in INB Banner. If you review a typical NBAJOBS record for an employee, you will see many fields – in fact, entire tabs of information that we do not use at UNCG. Some fields are automatically populated by Banner, others we chose to ignore. It would be impossible to train all staff to enter a new employee record directly into INB on the NBAJOBS form, so EPAFs were created to isolate only the required data fields into a form in UNCGenie.

There are four levels of hierarchy in the Electronic Personnel Action Forms module. You can be designated as an:

-  *Originator* – creates the EPAF through UNCGenie. **ONLY an Originator can create, or CHANGE an EPAF.**
-  *Interested Party* - receives an FYI notice that an EPAF has been submitted, but are not actively involved in its approval,
-  *Approver* – has departmental responsibility and authority to review and approve the personnel action,
-  *Applier* – has authority to finalize the EPAF and apply the data to the database for the specified employee.

There are three BannerHR forms that can be modified by EPAF actions:

-  *PPAIDEN* – the general Person Identification form
-  *PEAEMPL* – the Employee Identification form
-  *NBAJOBS* - the Job Assignment form

There are a limited number of personnel actions that cannot be accommodated by an EPAF, so paper forms may still be required. For instance, the first field on an EPAF asks for the employee's university ID number. If you are hiring a brand new employee, who does not yet have an ID assigned, there is no way to create an EPAF - so brand new employees are always submitted on paper forms or via the hiring proposal in Jobsearch.

Executing personnel actions via EPAFs also provides a permanent on-line history and audit trail for those actions. If your responsibilities include originating, approving, or being apprised of EPAFs, you will have access to a history queue that will hold all of the actions you've touched for 18 months. Thereafter, EPAFs can be accessed on the NOAEPAF form in INB Banner.

## **FINDING ANSWERS IN INB (Internet Native Banner)**

ALWAYS have INB BannerHR open on your workstation before beginning an EPAF! By checking a few screens, described below, for an employee's current records before starting an EPAF, you may be able to avoid some of the common errors that cause EPAFs to be returned by an approver.

Complete instructions for each of these Banner INB screens can be found at: [banner.uncg.edu/hr](http://banner.uncg.edu/hr)

### **NBAJOBS form**

- Current & historical job information
- See ALL jobs entered on an employee
- See detail about any job an employee has held in your department
- Position numbers
- Salaries
- Funding (Labor Distributions)

### **PEAEMPL form**

- Is the employee "Active" or "Terminated"?
- If record shows "Terminated", you cannot hire until this is changed!

### **NBAPBUD form**

- The funding of a position
- If I hire someone in a position, how will it be paid?

### **NZISBVW form**

- The current financial status of a FOAP, or of a Position

### **NBIPINC form**

- Who's in a position?

### **NBIPORG form**

- What positions belong to my department? (PORG = Positions in my Organization)

## MONTHLY PROCESSING DEADLINES

Timing is everything! To get everything processed before payroll begins, deadlines have been established.

- **EPAFs must be submitted, and approved by Departmental, PI and Unit levels by the 25<sup>th</sup> of the month** (for actions effective the following month). Need something to happen in October? You have to submit it in time for it to reach the HR Office approval level by the 25<sup>th</sup> of September.

Personnel Action Deadlines are published at  
[http://banner.uncg.edu/hr/Dates\\_Deadlines/](http://banner.uncg.edu/hr/Dates_Deadlines/)

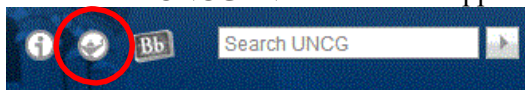
- The functional offices (HR, Provost, Contracts & Grants, Budget Office) who approve EPAFs try to meet a deadline of the 10<sup>th</sup> of the (effective dated) month. Monitor your submitted EPAFs by checking your Originator Summary to watch their progression, but be patient and allow the functional offices time to process their workload.
- **There are occasions when errors are found, or changes need to be made, after the deadline has passed. These situations are handled individually, depending on the circumstances. Please contact the appropriate HR office when you need a personnel action entered after a deadline has passed.**

## ENTERING EPAFS WITH FUTURE DATES

Using EPAFs allows departmental staff to do personnel actions far in advance. This is helpful for the Originator because you don't have to leave yourself tickler-notes to fill out an EPAF at some future date. *However*, the functional offices that analyze & approve EPAFs deal only with those most immediately dated, so your future action will sit in queue until the month it is to become effective. Don't stress! It isn't going to disappear from Banner. Too many circumstances can change between the time you originate the EPAF and the months later that it should be effective to make it efficient to apply so early. You'd end up changing way too many jobs.

## ACCESSING THE EPAF MENU

- Log onto the **Internet** and go to [www.uncg.edu](http://www.uncg.edu).
- Click on the **UNCGENIE** icon in the upper right hand corner.

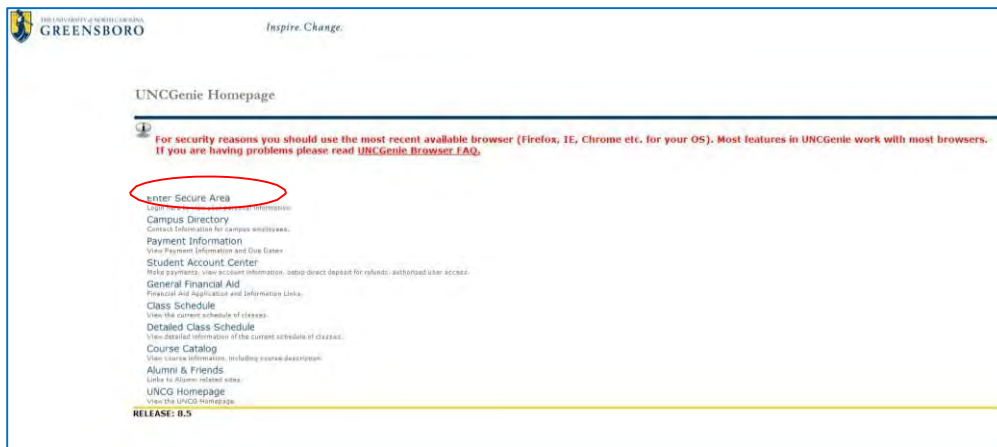


- Click on **Enter Secure Area**.

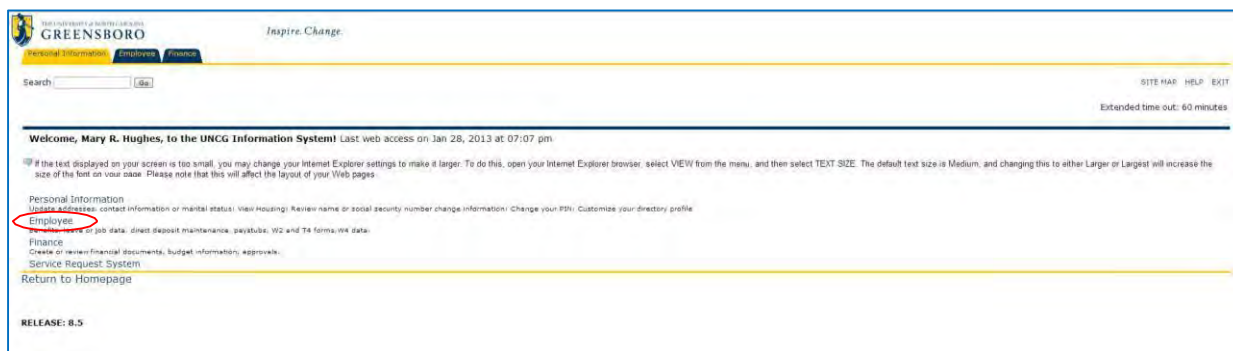


- Enter your **9-digit University ID and PIN\*\***
- Click **Login**.

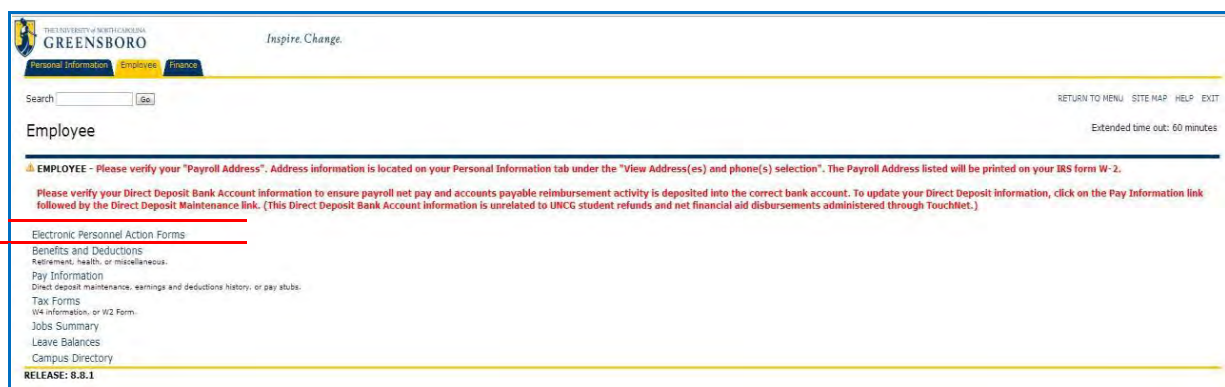
**\*\* If you have forgotten your PIN, enter your User ID and Click [Forgot PIN?]. Answer your security question, click Submit Answer. Then enter a new PIN; re-enter PIN.**



At the next window, Click **Employee**



In the Employee window, Click **Electronic Personnel Action Forms**



The Electronic Personnel Action Form window provides a portal to the five functions of EPAFs. If you are designated an Originator, or Approver of personnel actions, or are a Proxy for an Originator or Approver, you will navigate to your routing queues from this window.

The EPAF menu includes access to PAF actions (*Position Action Forms*), functionality created exclusively at UNCG to modify position number budgeting and funding information.

For actions that will change information about the *Employee, their Job, or their Job Funding*:

Select [Person, Job and Position Actions](#)

These are **EPAFs**

For actions that will change information about the *Position Funding or Budgeting*

Select [Position Actions](#)

These are **PPAFs**

For assistance with completing and submitting PAFs, please contact Amanda Levens in the Budget Office

The University of North Carolina  
GREENSBORO

Inspire Change

Personal Information Employee Finance

Search  Go

RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT

Electronic Personnel Action Form

Originator Summary

Person, Job and Position Actions  
Changes person or job actions or a combination of person, job and position actions.  
Requires the Employee ID number to begin.

Position Actions  
Updates position actions ONLY.  
Requires a Position Number to begin.

Act as a Proxy

RELEASE: 8.5

## GENERAL EPAF DATA ENTRY

### New EPAF Person Selection

All EPAFs begin with the same screen:

The screenshot shows the 'Person Selection' screen of the EPAF system. At the top, there is a header for 'THE UNIVERSITY of NORTH CAROLINA GREENSBORO' with navigation tabs for 'Personal Information', 'Employee', and 'Finance'. A search bar with a 'Go' button is located below the header. To the right of the search bar are links for 'RETURN TO EMPLOYEE MENU', 'SITE MAP', 'HELP', and 'EXIT'. The main title 'Person Selection' is centered. Below it, a instruction reads: 'Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.' A note states '\* - Indicates a required field.' The 'ID' field is marked with a red asterisk and contains a magnifying glass icon. The 'Query Date' is set to 'MM/DD/YYYY\*' with the value '01/30/2013'. The 'Approval Category' is marked with a red asterisk and is currently set to 'Not Selected'. A 'Go' button is at the bottom left. At the bottom right, there are links for 'EPAF Originator Summary' and 'Return to EPAF Menu'. The footer on the bottom left reads 'RELEASE: 8.8'.

Begin by typing in the employee's Banner ID number.

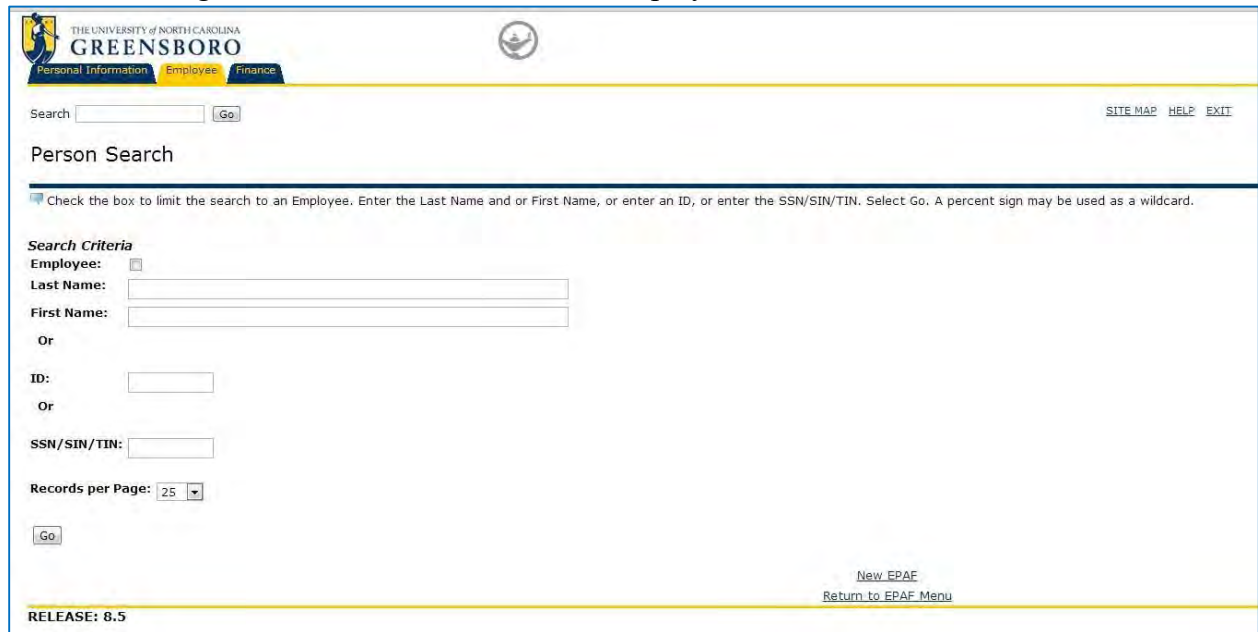
**No ID?** Always perform a full Person Search whenever you do not have a Banner ID for the employee. They may already be in Banner as a student, alumni, donor or even a campus vendor.

**For Brand New EPA Employees that do not have a PEAEMPL record in Banner** – have never been employed at UNCG and do not have a Banner ID, you must submit a paper PD-7 (<https://provost.uncg.edu/secure/epa/pd7.asp>) form rather than an EPAF.

**Brand New SPA** employees require the submission of an EAF form  
<http://web.uncg.edu/hrs/Forms/EAF/>

**Person Search:** If you do not have the Banner ID, you can search for the number by clicking the magnifying-glass icon 

When searching for a valid ID number, Banner displays this search screen:



The screenshot shows the Banner Person Search interface. At the top is the University of North Carolina Greensboro logo and navigation tabs for Personal Information, Employee, and Finance. A search bar with a 'Go' button is at the top right. Below the search bar is the 'Person Search' title. A checkbox allows limiting the search to employees. Search criteria include Last Name, First Name, ID, and SSN/SIN/TIN, each with a corresponding input field. A 'Records per Page' dropdown is set to 25. A 'Go' button is at the bottom left. At the bottom right are links for 'New EPAF' and 'Return to EPAF Menu'. The footer indicates 'RELEASE: 8.5'.

Search

[SITE MAP](#) [HELP](#) [EXIT](#)

**Person Search**

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

**Search Criteria**

Employee: ☐

Last Name:

First Name:

Or

ID:

Or

SSN/SIN/TIN:

Records per Page: 25

[New EPAF](#)  
[Return to EPAF Menu](#)

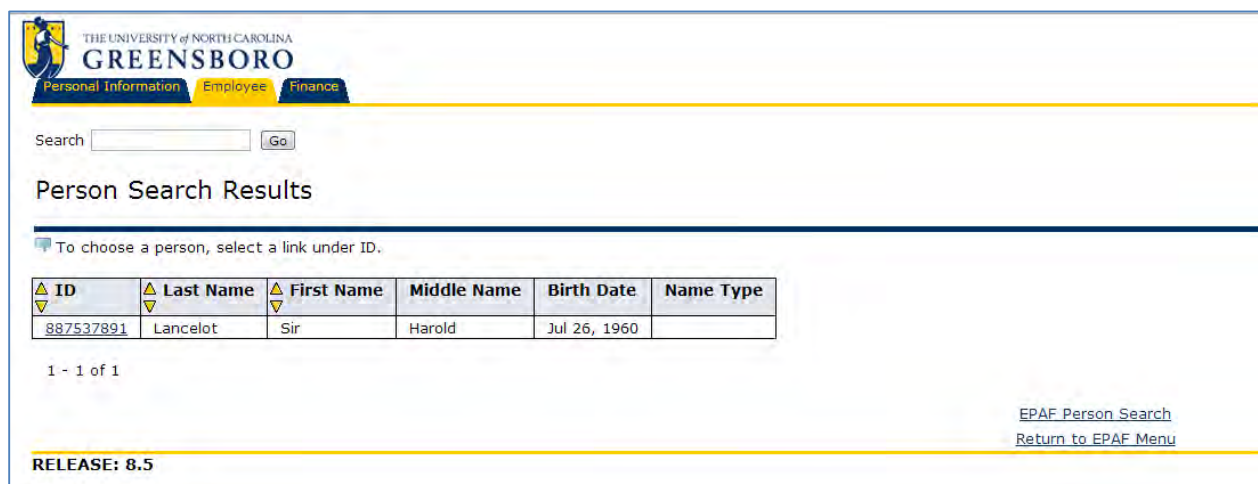
RELEASE: 8.5

You can enter the known Last Name, the Last Name and First Name (this Banner search is case sensitive)

Click **[Go]**

*Wait patiently* while Banner searches its very large UNCG database!

Once your results are displayed, click the ID number for the appropriate employee



The screenshot shows the Banner Person Search Results interface. It features the same header and navigation as the search screen. Below the search bar is the 'Person Search Results' title. A message instructs the user to select a person by clicking a link under the ID column. A table displays the search results with columns for ID, Last Name, First Name, Middle Name, Birth Date, and Name Type. The first result is for ID 887537891, Last Name Lancelot, First Name Sir, Middle Name Harold, Birth Date Jul 26, 1960, and Name Type. Below the table, it shows '1 - 1 of 1'. At the bottom right are links for 'EPAF Person Search' and 'Return to EPAF Menu'. The footer indicates 'RELEASE: 8.5'.

Search

**Person Search Results**

☐ To choose a person, select a link under ID.

ID	Last Name	First Name	Middle Name	Birth Date	Name Type
<a href="#">887537891</a>	Lancelot	Sir	Harold	Jul 26, 1960	

1 - 1 of 1

[EPAF Person Search](#)  
[Return to EPAF Menu](#)

RELEASE: 8.5

Proceed with the New EPAF Person Selection window:

EPAFs consist of basic blocks of information that vary depending on the specific personnel action being initiated. Follow these general instructions for data entry in these blocks. Exceptions to this can be found in this document by consulting the pages specific to the EPAF you have chosen.

## Positions & Suffixes

The second screen of EPAF creation is for designating the position to which you are hiring the employee, or selecting a previous pay action to reactivate.

THE UNIVERSITY of NORTH CAROLINA  
**GREENSBORO**

Personal Information Employee Finance

Search

### Job Selection

Enter or search for a new position number and enter the suffix, or select the link under Title.

**ID:** Sir Harold Lancelot, 887537891  
**Query Date:** Mar 01, 2013  
**Approval Category:** Ongoing Apptointment, EBONXX

**EPA Benefits Earning Job, EPJOB**

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job	000055	00	Director (OA30)	56207, Systems & Procedures					

There are no active jobs based on the Query Date.

[New EPAF](#)  
[Return to EPAF Menu](#)

RELEASE: 8.8

Position numbers are six-digits long, and are assigned in Banner INB to specific departments. The structure of INB connects positions to specific funding accounts. You can access a list of all position numbers assigned to your department on the INB form NBIPORG. Certain positions have alpha prefixes, to identify them as being non-budgeted, pooled positions (additional information can be found on Pg 9 of the Overview Section of the HR Training Manual)

### **Position Prefixes:**

- D** – Departmental Hourly: Undergrad & Grad
- E** – Temporary Faculty (Acct: 101010 = NON Teaching, Acct: 101030 = Teaching)
- F** – Undergraduate student FLAT pay
- G** – Graduate Flat Pays
- N** – Non-Faculty EPA (Acct: 101010 = NON Teaching)
- T** – SPA Temporary positions
- W** – Work Study
- Z** – Graduate Work Study

Suffixes are two extra characters that help differentiate positions when assigned more than once to an employee. At UNCG, we have standardized suffixes so they provide extra detail about the job record.

**Position Suffixes:**

**00 – 99:** Regular NBAJOBS records

**A0 – A9:** Additional Pay records (“add-pays”)

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**NEVER REACTIVATE THESE!!**

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**D0 – D9:** Dual employment jobs records

**CN:** Contract payout upon premature termination

**DS:** Short-term disability payment

**PO:** Payout records, created upon employee termination (**P-Oh**, not P-zero)

**SV:** Severance payment

**The Query Date**

Everything in an EPAF depends on the **Query Date**. Think of it as the Turn On Date – when do we want this action to “turn on” in BannerHR? Since EPAFs are ultimately controlling the *payroll actions* for an employee, we must set this date in terms of BannerHR Payroll functions.

Banner thinks in very strict blocks of time called ‘A Payroll Period’ – a one-month division of time. If you want your salaried employee to receive an entire paycheck, you must “turn on” BannerHR for the entire month (beginning on the first day of the month). Setting a date other than the first day of the month will cue BannerHR to prorate the first paycheck.

If, on the other hand, you have hired an employee to begin on the 9<sup>th</sup> of the month, and you do not want the employee paid for the first 8 days of the month (because they didn’t yet work here), you would set the Query Date to be the 9<sup>th</sup>, and BannerHR will prorate their first paycheck to exclude days 1 through 8.

Students and other hourly personnel do not get salaried checks that are based on a Payroll Period, so query dates for those EPAFs should be set to their first day of employment.

Example: Grad Asst begins work on August 25<sup>th</sup>, but their first paycheck is slated for September 30<sup>th</sup> – the Query Date will be 09/01/2013. By “turning on” BannerHR on the 1st, the grad assistant will receive a whole (non pro-rated) paycheck on September 30<sup>th</sup>.

Example: A faculty member is hired to begin teaching on January 12<sup>th</sup>, but their contract stipulates their first whole paycheck will be issued on January 31<sup>st</sup>. The query Date will be 01/01/2013 so that BannerHR will not prorate the first paycheck.

QUERY DATES:

**FOR SALARIED PERSONNEL:**

**The First Day of the First Month the employee will be PAID**

**FOR ADD-PAY ACTIONS:**

The First Day of the First Month the employee will be PAID

**FOR LABOR DISTRIBUTION CHANGES:**

The First Day of the First Month the change will take affect

**FOR GRADUATE ASSISTANTS:**

The First Day of the First Month the GA will be PAID (usually Sept 1st)

**FOR HOURLY PERSONNEL**

The First Day of Work

**TO CREATE OR UPDATE AN EMPLOYEE RECORD:**

Today's date

**FOR TERMINATIONS:**

The Last Day of Work

### Selecting the Correct EPAF

**Approval Category:** Click the drop-down arrow to access a listing of all available EPAFs. Select the correct EPAF based on the action you wish to initiate, and the approval routing it needs to include.

Personnel actions that affect funding from Contracts & Grants must be routed to the Contracts & Grants Office for approval. These EPAFs are identified with the abbreviation "C&G" in the title.

For example, the EPAFs

*Ongoing Appointment*

and

*Ongoing Appointment C&G*

execute the same personnel action, but the EPAF with "C&G" in the title has a pre-set routing queue that includes approval by the Contracts & Grants department.

### The Current Values Column

To the left of the data fields on an EPAF, Banner displays the current, or *last known*, job information for this employee in the column 'Current Value'. If there is no current, or last known, job information, or if the last job they held was not in your org#, no information is shown and Banner displays a misleadingly worded message "User does not have access to view current values".





### EPAFs in BANNERHR as of March 18, 2013

<b>Update Employee Record, UPDREC</b>	Change the employee's status on PEAEMPL, from "Terminated" to "Active" when rehiring a former employee. Also used to create a PEAEMPL form for new hires who have a university ID (perhaps a former student) but have never been an employee.
<b>Ongoing Appointment, EBONXX</b>	Used to hire "at-will" non-faculty, or tenured faculty teaching academic year, paid in 12 installments
<b>Ongoing Appointment C&amp;G, EBONCX</b>	Same as above, but with Contracts or Grants funding
<b>Appointment with End Date, EBTRXX</b>	Used to hire faculty and non-faculty with stated-term appointments, for faculty for fall semester, for spring semester or for the entire academic year. Also used to hire EPA Temps and any permanent employees <i>with known termination dates</i> .
<b>Appointment with End Date C&amp;G, EBTRCX</b>	Same as above, but with Contracts or Grants funding
<b>Reactivate Appointment with End Date, ERTRXB</b>	Reuse a position # previously assigned to the employee, that is currently showing a status of "Terminated". You can only reactivate a position that is assigned to your department, of course!
<b>Reactivate Appointment with End Date C&amp;G, ERTRCB</b>	Same as above, but with Contracts or Grants funding
<b>Faculty/Staff/Student Changing or Terminating Job @ UNCG, EMCHJC</b>	Terminate the employee's job (changes the Job Status to "Terminated") in your department when they are moving to another department at UNCG.
<b>Faculty/Staff/Student Changing or Terminating Job @ UNCG C&amp;G</b>	Same as above, but with Contracts or Grants funding
<b>Faculty/Staff/Student Terminating Job &amp; Leaving UNCG</b>	Terminate the employee's job (changes the Job Status to "Terminated") in your department when they are leaving the university. Upon submission, this EPAF generates an email to notify interested parties at the university.
<b>Faculty/Staff/Student Terminating Job &amp; Leaving UNCG C&amp;G, EMLVUC</b>	Same as above, but with Contracts or Grants funding
<b>Add Pay, EPNXAD</b>	Payment for work done beyond contract. SUFFIX always begins with an 'A'. Work for which Add-Pays can be made includes, but is not limited to: Grant work, research work, special admin assignments, work done

	with SOAR, overload teaching, advising, & summer sessions. Pay me for writing this book!
<b>Add Pay C&amp;G, EPNCAD</b>	Same as above, but with Contracts or Grants funding
<b>Reactivate Add Pay, EPXRAD</b>	Reuse a previously assigned add-pay position-suffix (A0 – A9)
<b>Reactivate Add Pay C&amp;G EPCRAD</b>	Same as above, but with Contracts or Grants funding
<b>Job Labor Distribution Change, EELPXX</b>	Change the funding (FOAP) associated with the employee's pay, when funding change is <i>not expected to be on-going</i> . (Ongoing, <i>permanent</i> changes to funding are processed on a PAF form).
<b>Job Labor Distribution Change C&amp;G EELPCX</b>	Same as above, but with Contracts or Grants funding
<b>Student Department Hourly Hire, STUHRL</b>	Hire an undergraduate or graduate student to an hourly paid position.
<b>Student Department Hourly Reactivate, STUHRR</b>	Re-hire a undergraduate or graduate student to a position-suffix for an hourly job they previously held in your department.
<b>Student Department Flat Pay, STUFLT</b>	Hire an undergraduate student to a position with a flat-pay rate. (a pre-determined, total amount of pay)
<b>Student Labor Distribution and/or Pay Rate Change, STUHR</b>	Change the funding(FOAP) and/or change the hourly pay rate on an undergraduate or graduate student hourly job.
<b>Grad Asst State Funded Hire, GAST</b>	Place a Graduate Assistant with state funding
<b>Grad Asst C&amp;G Funded Hire, GACG</b>	Place a Graduate Assistant with Contracts or Grants funding
<b>Grad Asst Trust Funded Hire, GATR</b>	Place a Graduate Assistant with Trust funding
<b>Grad Asst State Funded Reactivation, GASTR</b>	Reappoint a Graduate Assistant to the same state funded position-suffix they previously held
<b>Grad Asst C&amp;G Funded Reactivation, GACGR</b>	Reappoint a Graduate Assistant to the same C&G funded position-suffix they previously held
<b>Grad Asst Trust Funded Reactivation, GATTR</b>	Reappoint a Graduate Assistant to the same trust funded position-suffix they previously held
<b>Grad Asst State Funded Add Pay, GASTAP</b>	Payment for work done beyond contract using state funds. Suffix always begins with 'A'
<b>Grad Asst C&amp;G Funded Add Pay, GACGAP</b>	Payment for work done beyond contract using contracts or grants fund. Suffix always begins with 'A'
<b>Grad Asst Trust Funded Add Pay, GATRAP</b>	Payment for work done beyond contract using trust funds. Suffix always begins with 'A'

<b>Grad Asst State Funded Reactivate Add Pay, GASTAR</b>	Reappoint a Graduate Assistant to the same state funded add-pay position-suffix they previously held
<b>Grad Asst C&amp;G Funded Reactivate Add Pay, GACGAR</b>	Reappoint a Graduate Assistant to the same C&G funded add-pay position-suffix they previously held.
<b>Grad Asst Trust Funded Reactivate Add Pay, GATRAR</b>	Reappoint a Graduate Assistant to the same trust funded add-pay position-suffix they previously held.
<b>SPA Temp Hourly Hire, TEMPHR</b>	Hire an SPA-Temporary, hourly, employee
<b>SPA Temp Hourly Hire, C&amp;G, TMPHHC</b>	Same as above, but with Contracts or Grants funding
<b>SPA Temp Hourly Reactivate, TMPHRR</b>	Reappoint an SPA-Temporary, hourly employee to the position-suffix they previously held.
<b>SPA Temp Hourly Reactivate, C&amp;G, TMPREC</b>	Same as above, but with Contracts or Grants funding
<b>SPA Temp Labor Distribution and/or Pay Rate Change, TMPHRC</b>	Change the funding(FOAP) and/or change the hourly pay rate on an SPA-Temp hourly job.
<b>SPA Temp Labor Distribution and/or Pay Rate Change, C&amp;TMPRAC</b>	Same as above, but with Contracts or Grants funding
<b>SPA Probation to Permanent, SPAPTP</b>	End the employee's probationary period and set their job status to 'permanent'
<b>SPA Job Status Change, SPAJSX</b>	Change the status of an SPA employee's job, such as when the employee is placed on leave – without pay - and with or without benefits. FMLA, military services, absences due to injury or illness covered by Workers Compensation benefits.
<b>SPA Job Status Change C&amp;G, SPAJSC</b>	Same as above, but with Contracts or Grants funding
<b>Title Change for Faculty, Non-Faculty &amp; Grad School, EETITL</b>	Change the formal title assigned to the employee. Text-verbiage change ONLY – no salary or funding change can be made with this EPAF.
<b>Organizational Change, ORGCHG</b>	Used only on July 1 <sup>st</sup> of each year, to change an employee's department assignment when the organization number for their department has changed. Changes the [Home Org] & [Check Distribution Org]# on PEAEMPL, and the [Timekeeping Org] on NBAJOBS.



## Changing Labor Distribution

“Labor Distribution” means the fund(s) to which an employee’s salary is charged each month. A Labor Distribution grid is presented on almost every EPAF so that you can change the funding whenever you initiate a pay event. Sometimes, though, you aren’t changing anything about the person’s job assignment – you just need to change the funding. That’s called a *Labor Distribution Change* in EPAF Land.

**Banner is picky about how you enter information in the Labor Distribution grid. If you do not follow the steps below, the EPAF *WILL ERROR OUT*. I promise.**

Labor Distribution, 000045-00 Accountant, Last Paid Date: Dec 31, 2012

**Current**  
Effective Date: 07/01/2012

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
G	117032	117032	56207	101110	170					100.00			

**New**  
Effective Date: MM/DD/YYYY 03/01/2013

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
Q G	Q 117032	Q 117032	Q 56207	Q 101110	Q 170					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								
<b>Total:</b>										100.00			

✓ Defaulting values for Labor Distribution from the Job records.

**Effective Date:** Defaults in from the Query Date entered on the New EPAF Person Selection screen.

**Labor Distribution Line** To change the funding line,

**Do NOT manually change any fields of the FOAP**

- ✚ Enter the ‘G’ for COA (Chart of Accounts) ✚ Hit TAB key
- ✚ Enter the Index number ONLY
- ✚ Click the [Default from Index] – button below the grid.
  - Banner will fill in the matching fund, org and program number for your new Index. **Banner does not automatically fill in the account number – YOU must enter the account number manually!**
- ✚ Enter the missing Account number, and click the [Save and Add New Rows] button below the grid.

**Percent:** Enter the percent of salary to be charged to the specified FOAP. You may have been given a dollar amount, and will have to manually calculate the percentage of salary to enter in Banner. Banner only allows the percent to carry two decimal points, and this will sometimes prevent you from balancing the split-funding on Banner exactly to the penny with the salary dollar amounts you’ve been given. **TOTAL OF ALL PERCENT LINES MUST = 100.00**

**UNCG Policy: A salary cannot be split into a percent smaller than .05**

Information entered in the Labor Distribution section populates the corresponding fields on the [Job Labor Distribution] tab on the NBAJOBS form in Banner INB.

## Encumbrance Override End Date on Labor Distribution Grid

Encumbrance Override End Date is part of the functionality called Multiple Year Encumbering that allows a user to extend the salary encumbrance on a Grant beyond the end of the current fiscal year.

MYE TIPS (When to use the MYE Override End Date):

1. Use the Encumbrance Override End Date on the C&G Temporary Labor Change EPAF's or other C&G EPAF's that **do not** have a Job Termination End Date. A salary "buy-out" is a good candidate for using the EOED.
2. **DO NOT USE THE MYE Override End Date for these EPAF's:**
  - Add Pays
  - Graduate Students Assignments or Flat Pays with a Job Termination End Date
  - Any EPAF with a Job termination End Date
3. MYE applies **only** to Contracts and Grants in the fund range 20000 to 229999.

### Review Terms:

**Salary Encumbrance:** The amount of budget dollars committed to a future job assignment.

**Grant Encumbrance Period:** Defined by the effective start date of the assignment, and the lesser of the following: Job End Date, Grant Budget End Date, or the Encumbrance Override End Date (EOR Date).

**Encumbrance Override End Date (EOR Date):** New field on EPAF/Paper forms that allows a department to control the encumbrance period, by using a date that is earlier than the **Budget** or **Job** end dates for a job assignment.

**Grant Project Dates:** The entire length of the grant; may be multiple years.

**Grant Budget Start/End Dates:** Defined by the Grant Award Document, may encompass the entire grant project, or be a portion of the overall grant project period. The budget dates can be viewed on FRIFUND.

### EPAF with an *Encumbrance Override End Date*

New											
Effective Date: MM/DD/YYYY 06/01/2009											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date MM/DD/YYYY
<input type="text" value="G"/>	<input type="text" value="205400"/>	<input type="text" value="205400"/>	<input type="text" value="12204"/>	<input type="text" value="101030"/>	<input type="text" value="110"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="100.00"/>	<input type="text" value="12/31/2009"/>
<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"/>

### Important Rules for the MYE Override End Date Field:

1. The Encumbrance Override End Date cannot be greater than the Job End Date.

2. The Encumbrance Override End Date cannot be greater than the Grant Budget End Date.
3. Only salaries charged to grant funds can be encumbered for multiple years. Salaries charged to other funds will be calculated based on the Effective start date and Fiscal Year End (June 30).

**Example of the EPAF posted to NBAJOBS on the Job Labor Distribution tab:**

ID:	887348823	Sir Harold Lacelot	Last Paid Date:	
Position:	007558	Suffix: 00	Query Date:	01-SEP-20

Base Job	Job Detail	Payroll Default	Deferred Pay	Miscellaneous	Excluded Deductions/Benefits	Default Earnings	Work Schedules	Job Labor Distr
----------	------------	-----------------	--------------	---------------	------------------------------	------------------	----------------	-----------------

Effective Date: 01-JUN-2009

COA	Index	Fund	Orgn	Account	Program	Activity	Location	Project	Cost	Percent
>> G	205400	205400	12204	101030	110					100.00
Total Percent:										100.00

---

**Encumbrance Information**

Encumbrance Number:	PR090001	Grant:	205400	TEST - MYE PROCESS
Encumbrance Sequence:	2172	Budget Start Date:	01-JAN-2008	<input checked="" type="checkbox"/> Encumber Multi Year Labor
Latest Recast Date:	01-JUN-2009	Budget End Date:	31-DEC-2011	
Last Calculated Date:	12-MAY-2009 12:05:23	Encumbrance Override End Date:	31-DEC-2009	

 **\* Remember: In this example, an EPAF returning the job to state funds effective 1/1/2010 is still required to be submitted.**

A new block has been added to the **Job Labor Distribution** window. When a grant fund row is selected, the Grant Title, Budget Start and End Dates, and Encumbrance Override End date information will be displayed.

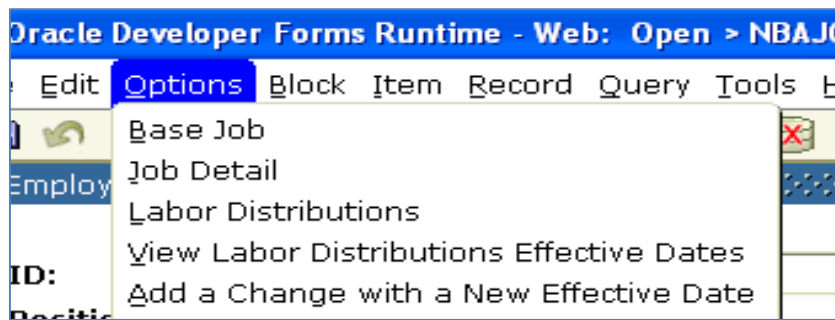
**NBAJOBS Reminder:**

Employees may have multiple effective dated changes on the **Labor Distribution Tab**. To view the most recent Labor Distribution record

Click **Options**,

Select **View Labor Distributions Effective Dates**

Select the **most recent date** from the list of records to view



*Where can I view the employees and the amount of budget encumbered for each employee on my grant?*

You can view the Salary Encumbrance for each employee working on the Grant in Banner HR, on the Spartan View (NZISBVW) form. Use the query type **By FOAP**, and enter the **index** and **account** numbers.

**NOTE:** The **Encumbrance** field will include the current **Fiscal Year** encumbrance, and any future year encumbrance amounts will appear in the new **Future Encumbrance** column (not included in BBA).

Salary Budget Form NZISBVW 7.3 (UGVAL4)

Query Type: By FOAP COA: G UNC Greensboro Fiscal Year: 2009

Index: 205400 Fund: 205400 Orgn: 12204 Account: 101030 Program: 110 Position: Position Title

TEST - MYE PROCESS Biology EPA Academic Salary Organized Research

FOAP Position

Funding										
Position	Fund	Orgn	Acct	Prog	Perm Budget	Revised Budget	Expend	Encumb	BBA	Future Encumb
000143	205400	12204	101030	110	.00	.00	.00	7,666.67	-7,666.67	23,000.01
000170	205400	12204	101030	110	.00	.00	.00	8,333.33	-8,333.33	24,999.99
000899	205400	12204	101030	110	.00	.00	.00	6,250.00	-6,250.00	187,500.00
001193	205400	12204	101030	110	.00	.00	.00	8,442.50	-8,442.50	58,655.00
007568	205400	12204	101030	110	.00	.00	.00	7,202.08	-7,202.08	43,212.48
Totals:					.00	.00	.00	37,894.58	-37,894.58	329,367.48

Jobs									
Position	Suffix	ID	Last Name	First Name	Effective Date	Status Reason	FTE	Salary	
007568	00	887348823	Lacelot	Sir Harold	01-JUN-2009	A LABOR	0	86,425.00	
007568	00	887348823	Lacelot	Sir Harold	01-SEP-2008	A	0	86,425.00	

Distribution									
Fund	Orgn	Acct	Prog	Dist %	Perm Budget	Revised Budget	Expend	Encumb	BBA
205400	12204	101030	110	100	.00	.00	.00	7,202.08	-7,202.08
245004	12404	101030	101	100	.00	.00	.00	.00	.00



### *How is the salary encumbrance on a grant fund calculated?*

The encumbrance period is controlled by effective start date of the NBAJOBS assignment, and the earlier of the following end dates for the job assignment:

1. **Encumbrance Override End Date** (New field available to use after 7/1/2009 on EPAF's and EPA/SPA paper PD-7 and EAF forms)

NAME	ACCT	Base Salary	Monthly Salary	Salary Encumbrance Period				Months	Calculated Salary Enc.
				Effective Date	EOR End Date	Job End Date	Budget End		
Sir Harold Lancelot	101030	86,425	7,202	6/1/09	12/31/09		12/31/11	7	50,414

**Encumbrance calculation:** 6/1/09 to 12/31/09 = 7 months. 7 months X monthly salary 6,054 = \$50,414

1. **Use of the Encumbrance Override End (EOR) Date Example:**

Original Job Assignment:

NAME	ACCT	Base Salary	Monthly Salary	Salary Encumbrance Period				Months	Calculated Salary Enc.
				Effective Date	EOR End Date	Job End Date	Budget End		
Ruby Jewel Clodfelter	101010	72,650	6,054	6/1/09			12/31/11	31	187,679

**Encumbrance calculation:** 6/1/09 to 12/31/11 = 31 months. 31 months X monthly salary 6,054 = \$187,679

2. **New EPAF submitted with an EOR Date entered of 9/30/09 to revise the Job Assignment:**

NAME	ACCT	Base Salary	Monthly Salary	Salary Encumbrance Period				Months	Calculated Salary Enc.
				Effective Date	EOR End Date	Job End Date	Budget End		
Ruby Jewel Clodfelter	101010	72,650	6,054	6/1/09	9/30/09		12/31/11	4	24,216

**Encumbrance calculation:** 6/1/09 to 9/30/09 = 4 months. 4 months X monthly salary 6,054 = \$24,216

The new encumbrance amount in Spartan View after the EPAF has updated NBAJOBS.

Salary Budget Form NZISBVW 7.3 (UGVAL4)

Query Type: By FOAP COA: G UNC Greensboro Fiscal Year: 2009

Index: 205400 Fund: 205400 Orgn: 12204 Account: 101010 Program: 110 Position: Position Title

TEST - MYE PROCESS Biology Organized Research

OAP Position

Position	Fund	Orgn	Acct	Prog	Perm Budg	Temp Budg	Curr Budg	Expend	Encumb	BBA
001347	205400	12204	101010	110	.00	.00	.00	.00	24,216.68	-24,216.68
G99901	205400	12204	101010	110	.00	.00	.00	.00	7,000.00	-7,000.00
000080	205400	12204	101010	110	.00	.00	.00	.00	83,125.00	-83,125.00

Position	Suffix	ID	Last Name	First Name	Effective Date	Status	Reason	FTE	Salary
001347	00	890003101	Gringo	Captain	01-JUL-2008	A	SGRP	1	71,209.91
001347	00	889463112	Clodfelter	Ruby	01-JUN-2009	A	LABOR	1	72,650.00

*Where can I view the amount of Salary Budget that is encumbered and the available balances for the personnel account lines for a grant fund?*

Beginning in July 2009, the budget encumbered for salaries will be available on the UNCG Budget Query Report accessed via UNCGenie:

**Important Reminder: Confirm there is budget available on the personnel accounts (101010, 101030, 101110) before submitting an EPAF or personnel forms with effort charged to grant funds. Contracts & Grants can not approve a payroll action when there is insufficient budget available to cover the salary charges.**

## UNCG Budget Query - Budget Status by Account

### Report Parameters

Grant Inception to Date Report			
By Account			
Period Ending Jun 30, 2009			
As of May 18, 2009			
Chart of Accounts	G UNC Greensboro	Commitment Type	All
Fund	205400 TEST MYE PROCESS	Program	110 Organized Research
Organization	12204 Biology	Activity	All
Account	All	Location	All
Grant	205400 TEST - MYE PROCESS		

### Query Results

Account	Account Title	GY09/PD06 Accounted Budget	GY09/PD06 Inception to date	GY09/PD06 Commitments	GY09/PD06 Available Balance
101010	EPA Regular Salaries	250,000.00	0.00	270,804.27	( 20,804.27)
101030	EPA Academic Salary	250,000.00	0.00	367,262.06	( 117,262.06)
Report Total (of all records)		500,000.00	0.00	638,066.33	( 138,066.33)

### Where can I view the Budget Dates for Contracts and Grant Funds?

In **Banner Finance**, budget dates can be viewed on the new INB form **FRIFUND**. Instructions for the FRIFUND form:

1. On the FRIFUND form all grant funds are listed, so press the **F7** Key to start the search for a specific grant fund.
2. Tab to the Fund Code field, and enter the grant fund number.
3. Press **F8** to perform the search
4. Use the scroll bar at bottom of form to view the budget date columns (See ex. below)
5. For funds with **multiple** records, refer to the record with the most recent **effective date**.

Here are the search results for the grant fund 209037. You will need to **use the scroll bar** to view the **budget dates** located on the far right side of the form.

Research Fund Inquiry FRIFUND 8.0 (UGVAL7)									
Fund						Research Accounting Fund			
Chart of Accounts	Fund Code	Title	Effective Date	Termination Date	Expenditure End Date	Grant Code	Title	Encumber	Multi Year Labor
	209037	Van Broekhuizen- SERVE	01-JUL-1990			209037	Van Broekhuizen-REL SERVE		
G	209037	Van Broekhuizen- SERVE	01-JUL-1990			209037	Van Broekhuizen-REL SERVE		
G	209037	Van Broekhuizen- SERVE	01-JUL-1990			209037	Van Broekhuizen-REL SERVE		

After scrolling to the right, you can view the budget dates.

**Budget Dates**

Fund					Research Accounting Fund				
Chart of Accounts	Fund Code	Title	Effective Date	Termination Date	Expenditure End Date	Effective Date	Termination Date	Budget Period Start Date	Budget Period End Date
G	209037	Van Broekhuizen- SERVE	01-JUL-1990			01-JUL-1990		16-MAY-2006	15-MAY-2011
G	209037	Van Broekhuizen- SERVE	01-JUL-1990			15-FEB-2007		16-MAY-2006	15-MAY-2011
G	209037	Van Broekhuizen- SERVE	01-JUL-1990			16-JAN-2009		16-MAY-2006	15-MAY-2011

Use the Scroll Bar to view the far right side of this form.

## SAVE, SUBMIT or DELETE AN EPAF

### SAVE AN EPAF

You can click **Save** at any point in entering an EPAF. The various **[Save]** buttons found throughout the EPAF screen save the entire EPAF regardless of their position in the EPAF body.

When saved, a **Transaction History Summary** section is added at the bottom of the EPAF screen, recording the date and originator of the EPAF.

**Transaction History**

Action	Date	User Name
Created:	Mar 10, 2008	Teresa Diana Nordan

Approval Types | Account Distribution | Routing Queue | Transaction History

[Save](#) [Submit](#) [Delete](#)

[Return to Top](#)

[New EPAF](#) | [EPAF Originator Summary](#)

[Return to EPAF Menu](#)

## DELETE AN EPAF vs. VOID AN EPAF

Only EPAFs that have not been submitted – you have not clicked the **[Submit]** button - can be deleted. An EPAF that is deleted is removed entirely from Banner, without a trace. EPAFs on the **[Current]** tab of the Originator Summary is the only place you will find the *Delete* button.

THE UNIVERSITY of NORTH CAROLINA  
**GREENSBORO**

Personal Information Employee Finance

Search

### EPAF Preview

✓ You are acting as an Originator.

<b>Name and ID:</b>	Ricky L. Bunch, 895073312	<b>Job and Suffix:</b>	013576-A0, Associate Professor
<b>Transaction:</b>	146397	<b>Query Date:</b>	Feb 01, 2013
<b>Transaction Status:</b>	Waiting	<b>Last Paid Date:</b>	May 31, 2009
<b>Approval Category:</b> Reactivate Add Pay, EPXRAD			

[Update](#) | [Add Comment](#)

[Approval Types](#) | [Default Earnings](#) | [Account Distribution](#)

When the EPAF has been submitted – you have clicked the [Submit] button to send it on its way - it is now is part of the database, and cannot be *deleted*. It can only be *voided*. Voiding an EPAF stops the action, but leaves a history record of it having existed. All EPAFs show a [VOID] button. Use it ONLY if the EPAF has been submitted.

THE UNIVERSITY of NORTH CAROLINA  
**GREENSBORO**

Personal Information Employee Finance

Search

### EPAF Preview

✓ You are acting as an Originator.

<b>Name and ID:</b>	Ricky L. Bunch, 895073312	<b>Job and Suffix:</b>	013576-A0, Associate Professor
<b>Transaction:</b>	146397	<b>Query Date:</b>	Feb 01, 2013
<b>Transaction Status:</b>	Waiting	<b>Last Paid Date:</b>	May 31, 2009
<b>Approval Category:</b> Reactivate Add Pay, EPXRAD			

[Update](#) | [Add Comment](#)

[Approval Types](#) | [Default Earnings](#) | [Account Distribution](#)

## WARNINGS, ERRORS & CORRECTIONS TO EPAFS

### CHECKING FOR ERRORS UPON 'SAVE':

Whenever you click [Save] to save an EPAF, Banner runs a simple error check. At this level, Banner only checks for formatting problems in the data you have entered. Most commonly, it sends back an error that your dates are not formatted as MM/DD/YYYY.

## CHECKING FOR ERRORS UPON 'SUBMIT':

Whenever you click [Submit] to finish an EPAF, Banner runs an error check against information already existing in Banner for that employee. It displays error messages in a table that identifies which section of your EPAF contains the error.

Some common error messages:

*ERROR* This employee already has a primary job. – <a href="#">Change the Contract Type field to “Secondary” and click [Save]</a>
*ERROR* User ID(s) must be entered for Routing Queue – <a href="#">You’re missing user-name(s) in your Routing Queue section. This can happen if you filled out the Routing Queue before saving the EPAF – if it finds any errors, it erases your Routing Queue. Always click [SAVE] before progressing to the Routing Queue section!</a>
*ERROR* Labor distribution must equal 100 percent – <a href="#">You did not follow the steps on Page 19 of this book to correctly enter information in the Labor Distribution grid section.</a>
*ERROR* Account code must be filled in for Approval Type, LD – <a href="#">Same as error above, you haven’t entered an Account number in the FOAP.</a>
*ERROR* Begin date must greater than or equal to the Job Effective Date – <a href="#">This employee’s already got a job in position number you’re trying to hire them to. Go to INB and look at their current information.’</a>
*ERROR* A duplicate transaction, ###, for this person exists for this approval category at Waiting Status – <a href="#">Someone has already created this EPAF for this person, but has not yet submitted it. If that person is you – please fix or delete the original EPAF you started.</a>

Make the necessary corrections to your EPAF. Click [SAVE], then [SUBMIT]. The error messages are not erased until you click [SUBMIT] again.

## WARNING MESSAGES UPON 'SUBMIT':

Whenever you click [Submit] to finish an EPAF, Banner runs an error check against existing information for that employee. Sometimes, it sends back a Warning Message as a notice for attention. Warnings do not stop you from submitting your EPAF, and all warning messages can be ignored on EPAFs here at UNCG.

The most common warnings are:

*WARNING* Total FTE for this position is greater than budgeted FTE.
*WARNING* Encumbrance has been set to 0, because method is Value Input

[You may ignore these messages](#) – Banner displays them because you are hiring the employee to a pooled, (non-budgeted) position.

## CORRECT A SUBMITTED EPAF

If you realize an error after you have submitted an EPAF, but before any of the Approvers have taken action, you can return the EPAF to yourself for corrections.

 [Access the Originator Summary](#)

- ✚ Click on the History tab
  - ✚ Locate the desired EPAF in the table
  - ✚ Click the employee name to open the EPAF
  - ✚ Click the [Return for Correction] button.
- On the subsequently displayed “EPAF Preview” screen,
- ✚ Click Update to return to the original, editable EPAF page

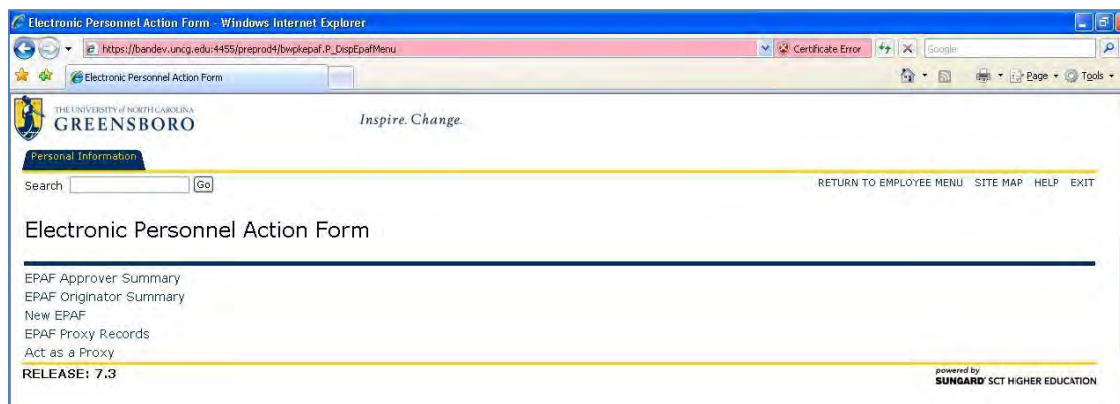
## PRINTING A HARDCOPY FOR PERSONNEL FILES

Banner HR archives all EPAFs in a History Queue that is available to the originator, approver, applier and proxy (if applicable). This history is NEVER DELETED. The data is housed on university servers that meet all industry standards for data integrity and safety.




So, naturally, you’ll want to print a copy on paper! To do so, simply click the printer icon on the toolbar of your internet browser screen. The entire EPAF will print, even though on screen, you can only view a portion at one time. However, the topmost and bottommost sections of the EPAF print in a painfully small font. To print in normal reading sized font, first Save & Submit the EPAF. Then open it from within your Originator Summary (History Tab), click the little file icon beside the comment box, and print the subsequent EPAF Preview screen.

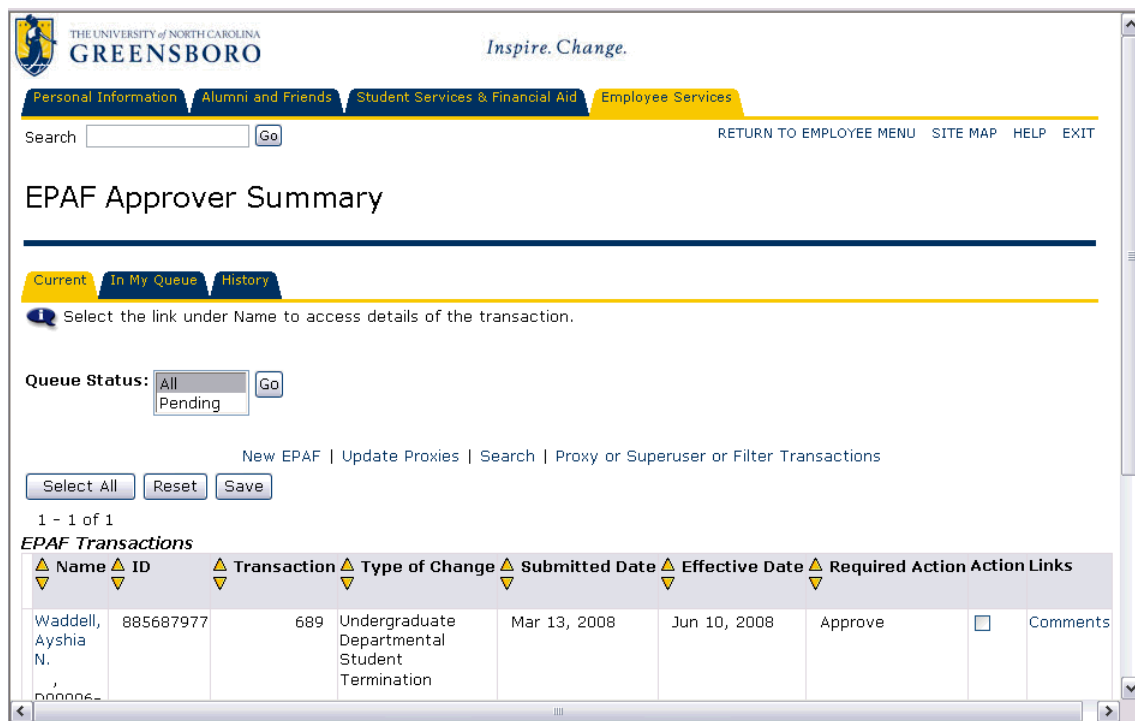
## MANAGING EPAF SUMMARY QUEUES

The Electronic Personnel Action Form window is the Main Menu of EPAFs. From here, you can review your Originator or Approval Summary, check your FYI notices, or consult the archives of past actions you have completed.




## EPAF Approver Summary

-  **For Approvers:** This is where actions await your intervention. Click on [EPAF Approver Summary](#) to be presented a list of personnel actions for your review and approval.
-  **For Interested Parties:** This is where actions await your notice. Click on [EPAF Approver Summary](#) to be presented a list of FYI's regarding personnel actions.
-  **For Appliers:** Banner is programmed to run a process every 10 minutes that picks any EPAF sitting at the Apply level, and applies them to Banner INB. This means within 10 minutes of the last functional office clicking 'Approve', your personnel action is created within Banner.




The screenshot shows the 'EPAF Approver Summary' page within the University of North Carolina Greensboro Banner system. The page has a navigation bar with tabs for 'Personal Information', 'Alumni and Friends', 'Student Services & Financial Aid', and 'Employee Services'. Below the navigation bar is a search field and a 'Go' button. The main heading is 'EPAF Approver Summary'. Below this is a sub-navigation bar with tabs for 'Current', 'In My Queue', and 'History'. A message icon indicates that users should select the link under 'Name' to access details of the transaction. There is a 'Queue Status' dropdown menu with options 'All' and 'Pending', and a 'Go' button. Below this are buttons for 'Select All', 'Reset', and 'Save'. A link 'New EPAF' is also present. The main content area displays a table of 'EPAF Transactions' with columns: Name, ID, Transaction, Type of Change, Submitted Date, Effective Date, Required Action, and Action Links. One transaction is listed for 'Waddell, Ayshia N.' with ID '885687977', Transaction '689', Type of Change 'Undergraduate Departmental Student Termination', Submitted Date 'Mar 13, 2008', Effective Date 'Jun 10, 2008', and Required Action 'Approve'. The Action Links column shows a checkbox and a 'Comments' link.

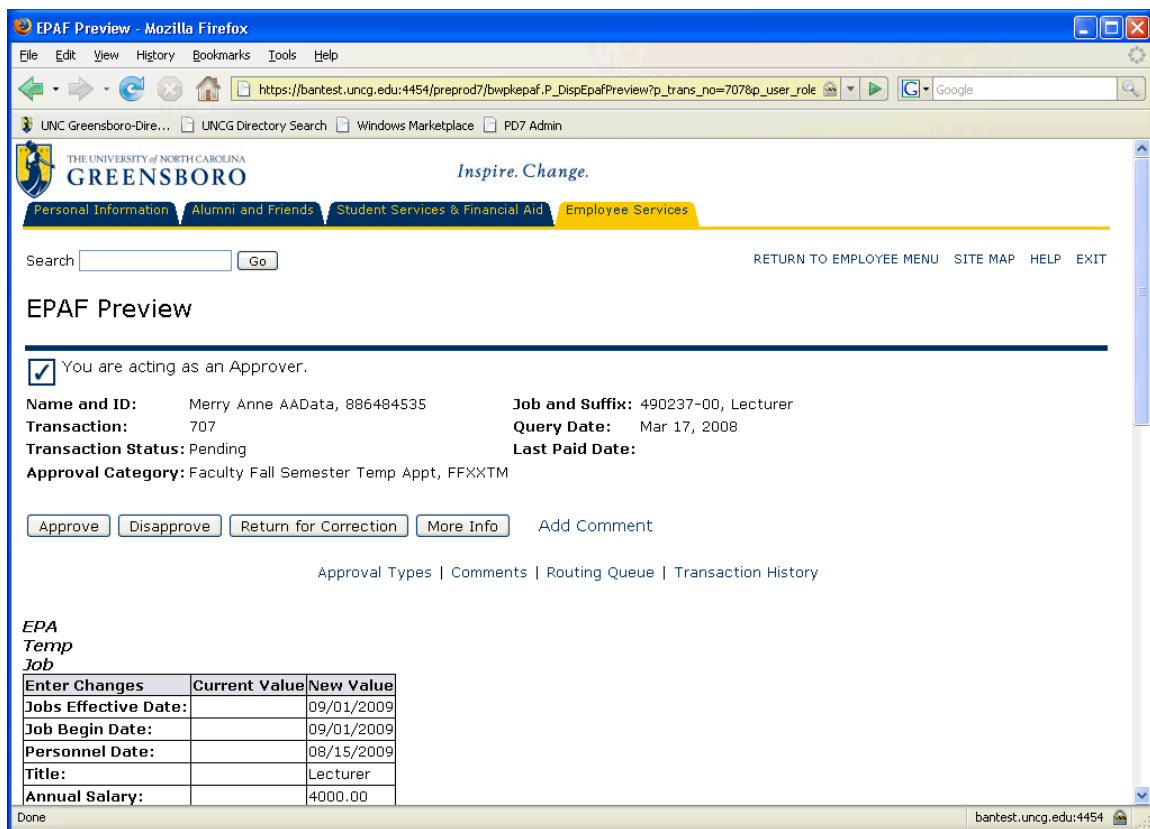
Approvals of EPAFs occur in the order specified by the Routing Queue for that specific EPAF. Each level of approval must be completed before the subsequent approver can take action.

-  Filter the list of personnel actions by selecting a **Queue Status** of *All* to view all actions, or *Pending* to view actions awaiting

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action Links
Personnel actions							

-  To view the EPAF detail, click on the employee's name





Review the personnel action details.

## Taking Action on an EPAF



The second section of the EPAF Preview screen contains buttons for

- ✚ **Approve** – completes your step in the routing queue and changes the status of the EPAF in the next approver's queue to "Pending". The status will remain "Approved" until the person defined in the queue with apply privileges applies the transaction to the database.
- ✚ **Disapprove** – stops the EPAF from applying to the database, and changes the status to "Disapproved". The individuals defined in subsequent levels no longer need to take action.
- ✚ **Return for Correction** – This status will allow you to return the transaction to the Originator for correction when an error is detected prior to final approval or application to the database. The EPAF can be updated and again submitted to the approval queue. If the transaction is resubmitted to the approval queue, all individuals defined as Approver or Applier will be required to take action on the transaction again. When an electronic approvals transaction is in "Return for Correction" status, it is as if the transaction was never submitted to the approval queue.
- ✚ **More Information** – Individuals defined in the approval queue with a required action of Approval may need more information about the transaction prior to taking positive

action. If this is the case, the approver can change the status to “More Information”. This identifies to the other individuals in the approval queue that some action is being taken.

- + **Add Comment** – allows the Approver or Applier to add pertinent information that will help clarify their intended action.
- + **Acknowledge**– this action is only available to persons in the queue as FYI-Interested Parties. Clicking “Acknowledge” indicates that person has seen the transaction. Failing to acknowledge a transaction will not impede its application to the database.

When you have taken action on the transactions in your queue, Banner returns a verification message

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Search   RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT

### EPAF Approver Summary

**Current** In My Queue History

☒ 1 transaction(s) processed successfully.

Select the link under Name to access details of the transaction.

Queue Status:

**X** No transactions found in your queue.

New EPAF | Update Proxies | Search | Proxy or Superuser or Filter Transactions  
Return to EPAF Menu

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## Email Notifications to Approvers

An additional software program called WorkFlow creates an email notification for the first Approver when an EPAF is submitted. The email message lists the type of EPAF, and the employee name, and provides a hyperlink to the UNCGenie login screen.

Managing and organizing the EPAF email notices is achieved with the use of Google email filters. If you have assigned someone to act as your proxy, create a Google filter to forward these notification to the Proxy.

As each Approver completes their task, WorkFlow generates an email notice to the next Approver in the Routing Queue. If the EPAF is returned for correction, the originator is notified.

**MONITOR ALL EPAFS UNTIL THEY HAVE APPLIED AND HAVE A STATUS OF COMPLETED!**

**YOU DO NOT HAVE TO RECEIVE THE EMAIL NOTIFICATION IN ORDER TO APPROVE AN EPAF. ALL THE EMAIL PROVIDES IS A LINK TO THE UNC-GENIE LOG-IN SCREEN. YOU CAN GO INTO GENIE DIRECTLY FROM THE UNCG-HOME PAGE, OF COURSE, AND GET THE JOB DONE**

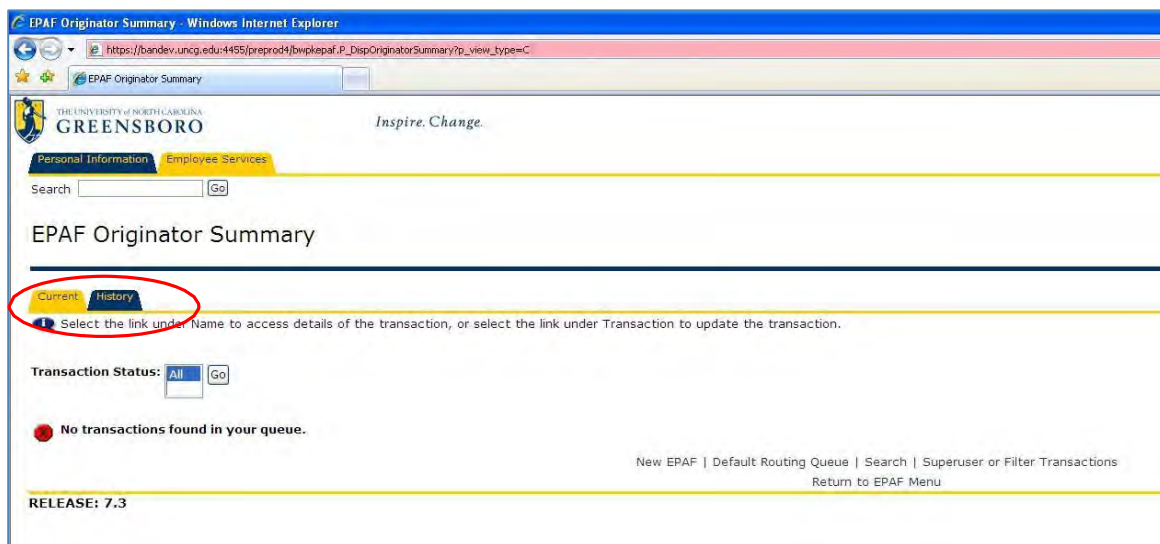
### Duplicate Approvers on One EPAF

There are instances when the same Approver is listed twice on one EPAF. Banner doesn't handle this well, but if, for instance, the Principal Investigator and the Department Head are the same person in your department, you will find yourself forced to list them twice in the Routing Queue of some EPAFs. As an Approver, you'll find that Banner balks when you try to perform the 2<sup>nd</sup> approval. To work around this issue:

- ✚ Perform the 1<sup>st</sup> Approval as outlined above, opening the EPAF for review, and clicking the appropriate button (Return for Correction, Add a Comment, Approve, etc)
- ✚ Perform the 2<sup>nd</sup> Approval directly from the summary grid. Do NOT open the EPAF for review. Instead, click the check-box in the Action column of the summary. Then click [Save]

### EPAF Originator Summary

This is where all of the EPAFs you have initiated, and/or submitted are stored. You can return to this summary to complete an EPAF left in progress, to correct those returned to you for corrections, or to consult the archived copies of past EPAFs.





EPAFs are separated onto two tabs within an Originator Summary:

**[Current]** tab displays EPAFs that have been started and saved, but not submitted – or EPAFs that have been ‘Returned for Correction’ by an Approver. The Current tab is a “holding tank” for EPAFs in progress. The Transaction status can be ‘Waiting’ (items not yet submitted), or ‘Returned for Correction’

**[History]** tab displays EPAFs that have been submitted. The History tab will display 18 months of activity. Transactions status can be ‘Pending’, ‘Disapproved’, ‘Approved’ or ‘Complete’

### List Filter






Transaction Status:  

Over time, your Originator Summary can grow to hold dozens, hundreds or even thousands of EPAFs. To facilitate managing your summary, you can filter the lists to display only those transactions you wish to view. Select the Transaction Status you

desire and Click 

### Return for Correction – *to yourself*

An EPAF Originator can snatch back an EPAF after it has been submitted -

-  Access the Originator Summary
-  Click on the History tab
-  Locate the desired EPAF in the table
-  Click the employee name to open the EPAF
-  Click the [Return for Correction] button.

### Returned for Correction by an Approver

Only the Originator of an EPAF can edit, or correct an EPAF. EPAFs that have been Returned for Correction carry that status, and can be viewed on the [Current] tab of the Originator Summary.

To edit the EPAF (make corrections), click on the employee name in the EPAF table to open the EPAF. Then click Update to return the EPAF to its original, editable format. Make any necessary corrections. Save and Submit the revised EPAF.



### Void a Submitted EPAF

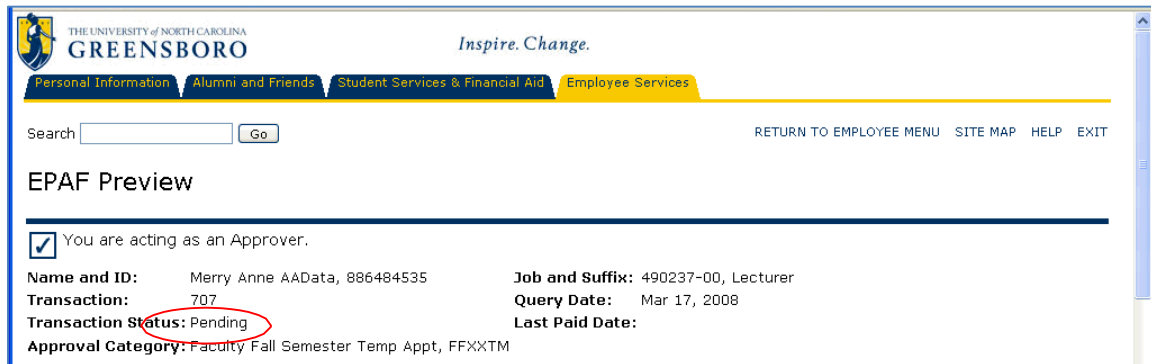
Only the Originator of an EPAF can void the transaction. Open the EPAF by clicking on the employee name in the Summary table. Click the [VOID] button. EPAFs that have been voided remain in Banner history with a status of ‘Voided’.

### Transaction Statuses on an EPAF

The Transaction Status is an indicator of the current state of the EPAF’s progression through approval levels to the final approval and application to the database. When an EPAF is

submitted, it is viewable to everyone specified in the Routing Queue, but the Transaction Status indicates whether or not a specific individual can take action.

-  **Waiting** – The transaction is in the process of being created and has not been submitted to the approval queue. Only the Originator can see this EPAF. Only EPAFs that are in status Waiting can be deleted.
-  **Pending** – Indicates the transaction requires positive action by the approver(s). The transaction remains at this status until action is taken by next person in the queue.



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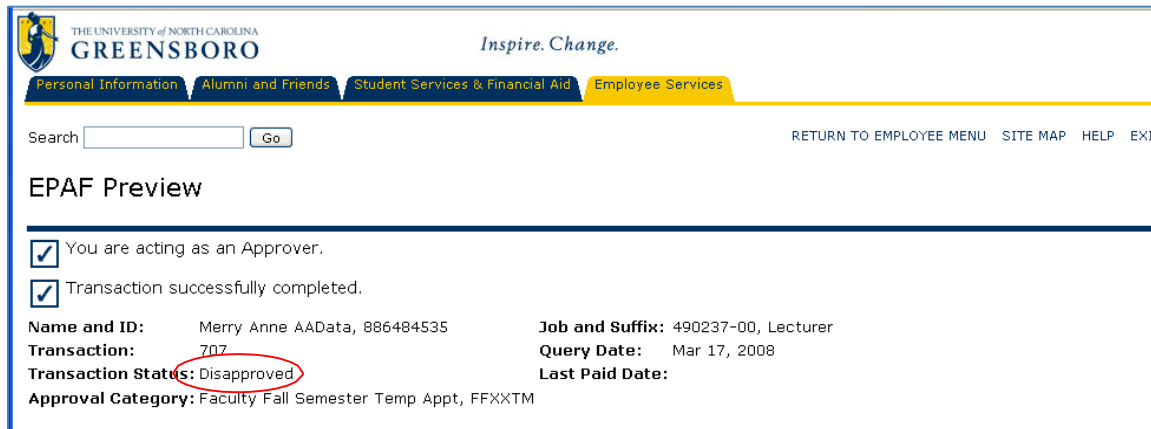
Search  Go RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT

**EPAF Preview**

☒ You are acting as an Approver.

**Name and ID:** Merry Anne AAData, 886484535 **Job and Suffix:** 490237-00, Lecturer  
**Transaction:** 707 **Query Date:** Mar 17, 2008  
**Transaction Status:** Pending **Last Paid Date:**  
**Approval Category:** Faculty Fall Semester Temp Appt, FFXXTM

-  **Return for Correction** – the transaction has been returned to the Originator and is treated by Banner as if it had never been submitted.
-  **Disapproved** - the transaction has been rejected by an Approver



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Search  Go RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT

**EPAF Preview**

☒ You are acting as an Approver.  
☒ Transaction successfully completed.

**Name and ID:** Merry Anne AAData, 886484535 **Job and Suffix:** 490237-00, Lecturer  
**Transaction:** 707 **Query Date:** Mar 17, 2008  
**Transaction Status:** Disapproved **Last Paid Date:**  
**Approval Category:** Faculty Fall Semester Temp Appt, FFXXTM

-  **Approved** – positive action has been taken by the Approver.
-  **Complete** – The transaction has been applied to the database.

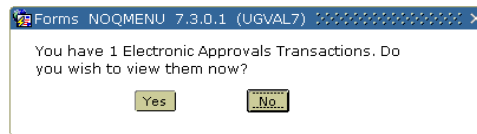
## OTHER EPAF MENU OPTIONS

**Act as a Proxy** – If you are acting as a Proxy for an Approver, actions awaiting your attention will be found by clicking EPAF Proxy Records.

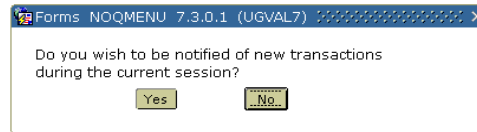
**EPAF Proxy Records-** This EPAF function allows an Approver to designate a Proxy to act on their behalf to acknowledge and/or approve personnel actions. The chosen Proxy must have BannerHR Security access to the same employees as the Approver.

## NOTICES IN INB-INTERNET NATIVE BANNER

**Banner Notices in INB:** When you log in to Banner INB, and you have EPAF actions waiting in your Approval Summary, you receive a Banner Pop-Up:



Click [Yes] to be taken to your Approval Summary  
Click [No], and Banner asks a second question:



Click [Yes] to be periodically reminded by a Banner Pop-Up while in the INB session  
Click [No] to bypass all EPAF actions for this INB session

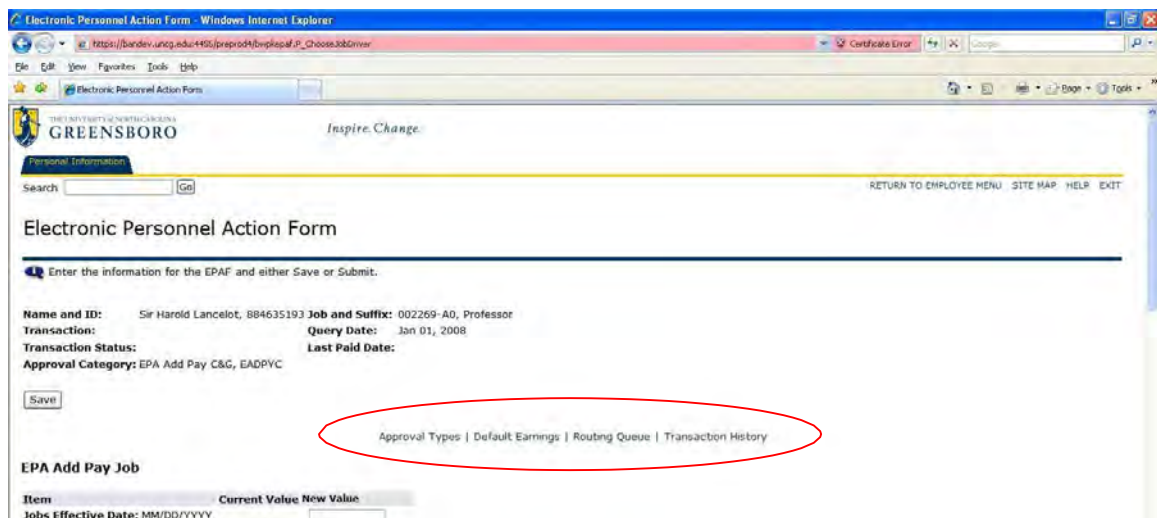
## NAVIGATING ON AN EPAF SCREEN

Banner has navigational quirks specific to moving around an EPAF screen in UNCGenie. When you use a drop-down box to select from a list of values, and choose a value, you are not returned to the point from which you left, but to the top of the EPAF screen. Scroll, scroll, scroll to get back to work!

Whenever you click **Save** under one of the building-block sections on an EPAF, you are taken to the top of the EPAF and must scroll downward to where you had been. Scroll, scroll, scroll to get back to work!

When you click **Submit**, the window redraws from the top, but the link you need to begin another New EPAF is at the very bottom of the screen. Scroll, scroll, scroll to find your link!

There are some helpful links near the top of the EPAF screen that will move your view to the Approval Types block, Default Earnings block, Routing Queue block or Transaction History block. If your selected EPAF doesn't have the corresponding block, your view will shift to the middle of the EPAF body.



Generally speaking, the Banner EPAF screen jumps around a lot, making it a bit less user friendly. A minor complaint, but if you initiate a lot of EPAFs you'll do a lot of clicking and scrolling during your day.

## SETTING UP PROXIES

When you are unavailable to act (as an Approver or an Interested Party) on the items in your EPAF Summary, a Proxy may act for any or all of the approval levels, on your behalf. The selected Proxy cannot initiate this designation, you must do it while logged in to UNCGenie. You and the Proxy must have the same security level in BannerHR.

To designate someone to act on your behalf as an EPAF Approver or Interested Party, you must register them in BannerHR. Understand that actions taken by your Proxy will bear *your name*, and will not give any indication they were performed by anyone other than you.

### Assigning a Proxy

- ✚ Log into UNCGenie
- ✚ Go to **"Employee"** menu
- ✚ Go to **"Electronic Personnel Action Forms"** Menu
- ✚ Click **"EPAF Proxy Records"**
- ✚ Select the **Approval Level (The EPAF)** for which you wish to assign a proxy. The "Approval Level" list will include all the levels for which you are an approver. Proxies can be assigned for any or all of them.
- ✚ Select the **User Name** of the person to be the proxy and check the "Add" checkbox.
- ✚ Click **"Save"**
- ✚ Continue to add User Names until you have added all the proxies for this Approval Level.
- ✚ Repeat these actions for all applicable EPAFs

**EPAF Originators do not assign a Proxy.** In Banner, EPAFs are the sole property of the Originator - no one is allowed to modify an EPAF that they didn't initiate. So, there is no need for a Proxy.

## WHAT TO DO WHEN AN ORIGINATOR TERMINATES

Banner considers an EPAF to be the sole property of the Originator. Only the Originator can log into UNCGenie and see the EPAFs in their Originator Summary and only they can correct, edit or void existing EPAFs. So what happens when an Originator quits their job, or transfers to another department? We've already explained that Banner doesn't allow a Proxy for Originators, so what happens to the EPAFs in progress for that person?

Most abandoned EPAFs will proceed thru approval and apply without a problem, but some may be returned for correction, returned with a request to be voided, or disapproved.

The *unfinished, unapplied* EPAFs that have been 'orphaned' by the former employee can be reassigned to a new employee through a program written exclusively here at UNCG. Complete and submit an EPAF Transfer of Ownership form, found at [banner.uncg.edu/HR](http://banner.uncg.edu/HR) to have this task run for your department.







## CREATING & EDITING DEFAULT ROUTING QUEUES

Streamline your processing of EPAFs by pre-selecting the Approvers for the Routing Queues of the EPAFs you use. Taking the time to do this step will save you *hundreds* of mouse clicks per month! Create a Default Routing Queue for each EPAF you regularly use means whenever you initiate that EPAF, the entire Routing Queue is already filled out. In other cases, the Routing Queue that was built into the EPAF may not meet the needs of your department, in which case creating your own Routing Queue is a necessity.

Of course, to perform this trick, you must have security access as an EPAF Originator.

### Default Routing

These steps fill out the Routing Queue that is built into an EPAF screen so that you do not have to repeatedly select User Names for each approval level.

-  Log into **UNCGenie**
-  Go to **"Employee"** menu
-  Go to **"Electronic Personnel Action Forms"** Menu
-  Click EPAF **"Originator Summary"**
-  Click **"Default Routing Queue"** (Link at bottom of Summary)
-  Select the **Approval Category (EPAF Title)** for which you wish to set the default routing and

**Click !**





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Search

### EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category:

**Approval Queue**


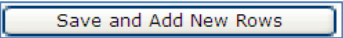
Approval Level	User Name	Required Action
12 - (DEPT) Department	<input type="text"/>	Approve
34 - (HR) HR Office	<input type="text"/>	Approve
40 - (BUDGET) Budget Office	<input type="text"/>	Approve
97 - (BENFYI) Benefits FYI	<input type="text"/>	FYI
97 - (I-9) I-9 FYI	<input type="text"/>	FYI
99 - (APPLY) EPAF Apply	<input type="text"/>	Apply
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

✓ Mandatory Levels defaulted from Electronic Approval Category Form (NTRACAT).

[EPAF Originator Summary](#)  
[Return to EPAF Menu](#)

RELEASE: 8.8

BE SURE TO CLICK **[GO]** SO BANNER PRESENTS THE PRE-CODED LEVELS.  
DO NOT ENTER THE LINES OF THE ROUTING QUEUE YOURSELF!

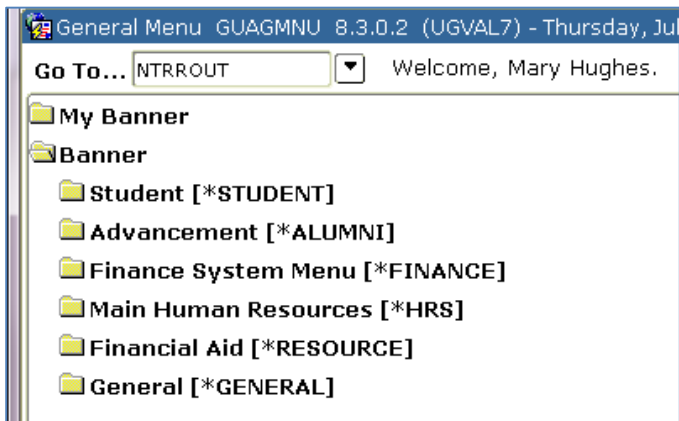
- Click the magnifying glass  and a list of valid approvers will pop-up. Select the appropriate approver for your needs. **Do not change the “Required Action” listed.**
- Repeat until all required Approval Levels have an approver.
- You can **add a level**, such as Unit Approver by filling out the next blank line at the bottom. When you click [Save], Banner will sort the Routing Queue into the appropriate order.
- You cannot remove a pre-coded Approval Level. For instance, in this example, if the PI and the Department Approver is the same person in your Department, you cannot delete one of the levels, you have to enter the same person twice. (Banner doesn’t like having the same person listed twice, but there’s a trick to work-around it when approving an EPAF. **See Pg. 33**)
- Click  to Save your Routing Queue selections

## Editing Routing Queues in INB Banner

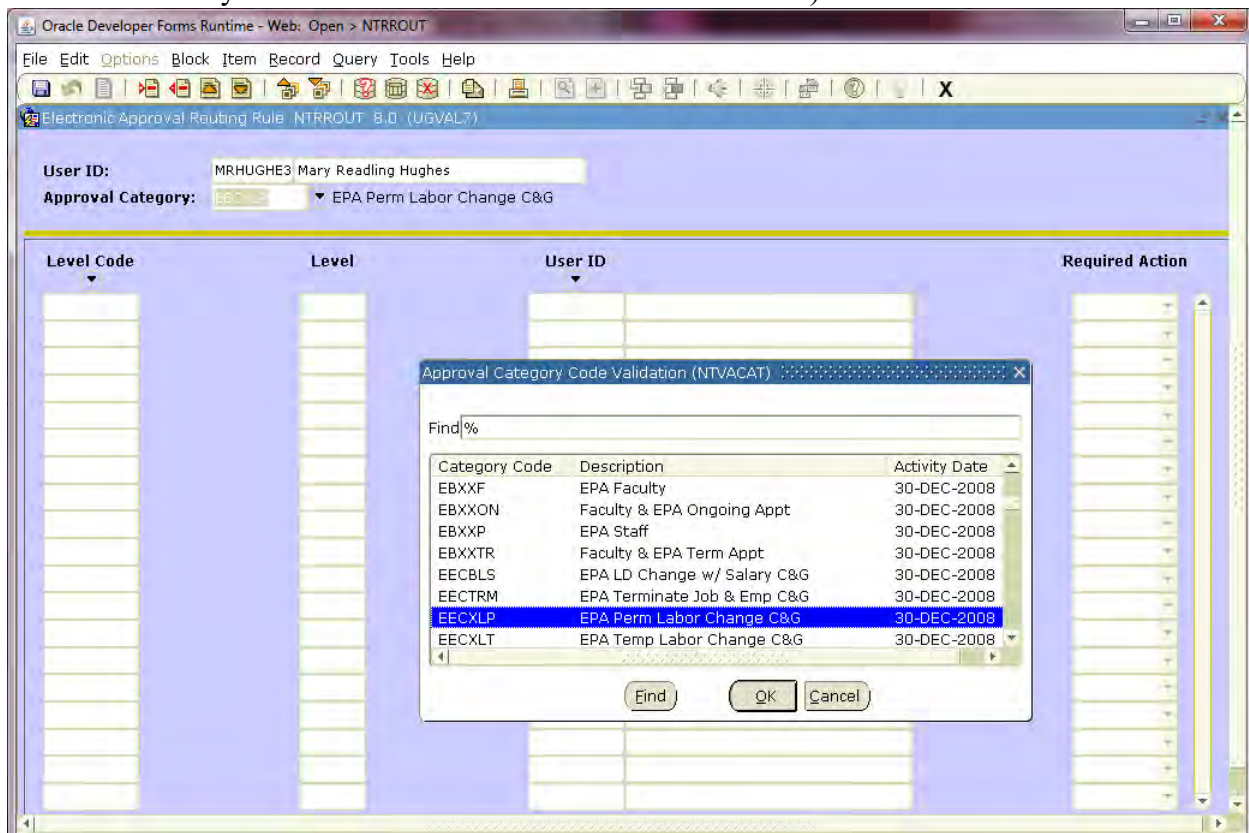
As with everything you see & do in UNCGenie, the data actually lives in INB Banner. You can create and edit Default Routing Queues directly in INB.

- Log into INB Banner
- Go to form

NTRROUT



-  Select the EPAF from the drop-down menu for Approval Category. (The menu is ordered by the six-character Banner name for the EPAF).



 Click Next-Block  or press Ctrl-Page-Down


Level Code	Level	User ID		Required Action
APPLY	99	EPAFCTRL	EPAFCTRL Diagnostic	Apply
PI	10			Approval
DEPT	12			Approval
CG	35	EPAFGRNT	EPAFGRNT Diagnostic	Approval
BUDGET	40	EPAFBUDG	EPAFBUDG Diagnostic	Approval
EPA-HR	34	EPAFEPA	EPAFEPA Diagnostic	Approval

- Fill in the User IDs for each Approver Level. (Banner presents the levels in random order, but no worries – they will sort into level order when you create an EPAF).
- Click [Save]

## ACCESSING HISTORIC EPAF DATA

After 18 months, EPAFs no longer display in UNCGenie. To access EPAFs that have aged off the Summary, you must log into Banner INB. Only the Originator or someone listed in the Routing Queue can access historic data for a given EPAF.

From the Banner General Menu  
Go to: [NOAEPAF](#)

- Enter the employee's Banner ID #
- Click the  look-up button beside Transaction: to see a list of all EPAFs submitted for that employee

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action: NOAEPAF 8.3 (UGVAL7)

☐ Pending Change

Proxy For:

ID: 886845488 Ms. Jennifer Butler

Transaction:

Approval Category:

Approval Type:

Generate ID:

Query Date:

Last Paid Date:

Position:

Suffix:

Transaction Number Validation

Find %

Transaction No	Category	Transaction Status
13402	GAST	Voided
13439	GAST	Completed
22741	GASTR	Completed
27275	GRDPHR	Completed
31069	GASTR	Completed
37590	GASTR	Completed
47842	GASTR	Completed

Find OK Cancel

Applied Status Field Name

Approver Action:

Queue Status:

Choices in list: 7

Record: 1/1

- ✚ Click to select the desired EPAF
  - If you do not know which Transaction you need to view, select one and review the information displayed in the key block of the form. If the [Query Date](#) or [EPAF Name](#) (Approval Category) is not what you want, click the Transaction Search button and select a different Transaction number. Continue to do this *search, select and review* process until you arrive at the EPAF you want to view.
- ✚ Click OK
- ✚ Click Next-Block, or press Ctrl-PgDn to view the detail



Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 8.4.0:1 (UGVAL3)

☐ Pending Change

Proxy For:

ID: 886845488 Ms. Jennifer Butler

Transaction: 22741 Completed

Approval Category: GASTR Grad Asst State Reactivate

Approval Type: GSJOBR Grad Assist Reactivate Job

Generate ID: ☐

Query Date: 01-MAY-2009

Position: 013184 Service Assistant

Suffix: 01

Last Paid Date: 30-APR-2010

Transaction | Default Earnings | Job Labor Distribution | Routing | Other Information and Comments

**Applied Status**

	Field Name	Current Value	New Value
A	Jobs Effective Date*	01-MAY-2009	01-MAY-2009
A	Personnel Date*	14-MAY-2009	14-MAY-2009
A	Title	Graduate Assistant	Graduate Assistant
A	Annual Salary	1612.5	1612.50
A	Factor	2	2
A	Pays	2	2
A	Timesheet Orgn	12015	12015
A	Contract Type	P	P
A	Job Change Reason*	REAB	REAB
A	Accrue Leave	N	N

\* - indicates a required field.

Approver Action:


Queue Status:

Enter new value.

Record: 1/?

<OSC>

Once an EPAF has been applied, the Default Earnings and Job Labor Distribution data is stored on the NBAJOBS record. Thus **Default Earnings** tab and the **Job Labor Distribution** tab do not display on NOAEPAF for applied EPAFs. That information can be accessed on NBAJOBS, Labor Distribution tab, by selecting the appropriate effective date.

 Click the [Routing] tab to view the Routing Queue

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 8.4.0.1 (UGVAL3)

**Pending Change** Proxy For:

ID: 886845488 Ms. Jennifer Butler **Generate ID:**

Transaction: 22741 Completed **Query Date:** 01-MAY-2009 **Last Paid Date:** 30-APR-2010

Approval Category: GASTR Grad Asst State Reactivate **Position:** 013184 Service Assistant

Approval Type: GSJOBR Grad Assist Reactivate Job **Suffix:** 01

Transaction Default Earnings Job Labor Distribution **Routing** Other Information and Comments

Originator ID: BAFREDIA Mrs. Barbara A. Frediani

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
DEPT	12	MEWILES	Mr. Mark E. Wiles	Approval	Approved	23-APR-2009
UNIT	15	EWMEEEKS	Mrs. Elizabeth W. Meeks	Approval	Approved	23-APR-2009
GRAD	45	EPAFGRAD	EPAFGRAD Diagnostic	Approval	Approved	27-APR-2009
APPLY	99	JHANDERS	Mrs. Joella Hoskin Anderson	Apply	Applied	27-APR-2009

Level Code. Press LIST for All, CGH - Mandatory Lvl's, Dup Item - Personal Queue

Record: 1/4 <OSC>

Click the [Other Information and Comments] tab to view the Comments and recorded Date information

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 8.4.0.1 (UGVAL3)

**Pending Change**

**Proxy For:**

**ID:** 886845488

**Transaction:** 22741

**Approval Category:** GASTR

**Approval Type:** GSJOBR

**Generate ID:** ☐

**Query Date:** 01-MAY-2009 **Last Paid Date:** 30-APR-2010

**Position:** 013184

**Suffix:** 01

Transaction Default Earnings Job Labor Distribution Routing **Other Information and Comments**

**Created Date:** 23-APR-2009 **Submitted Date:** 23-APR-2009 **Application Date:** 27-APR-2009

**Originator ID:** BAFREDIA **Submitter ID:** BAFREDIA **Applied to Database By:** JHANDERS

**Comment:**

**Date and Time:** 23-APR-2009 13:36:44

**Made By:** BAFREDIA

**Comment:**

**Date and Time:**

**Made By:**

\*NOTE\* Inserts comments are not allowed to completed transactions.

Record: 1/1 <OSC>

**NOTE:** If either the originator or any approver has since left the university, their Banner accounts have been deactivated leaving Banner unable to display the EPAF information. To remedy this situation, send an explanatory email to Wendy Blum ([wblum@uncg.edu](mailto:wblum@uncg.edu)) to have the missing person's user name re-entered on GOAEACC. That will allow you to view the historic data without giving the terminated employee access to our system.



## EPAFs DETAIL LISTING

### UPDATE EMPLOYEE RECORD

Before you can submit an EPAF to appoint any employee to a position (give them a job), there must be a completed 'Active' PEAEMPL form in INB Banner. This EPAF can be used for either of two actions:

- 1) Add required employee information to the PEAEMPL form, for a person who already has a university ID in Banner, but has never been an employee. For example, when a Student becomes an Student employee.
- 2) Resets the employee Status on the PEAEMPL form from 'Terminated' (because the employee was previously terminated) to 'Active' which makes them 'hire-able' with an EPAF.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	Today's date
Approval Category	Update Employee Record
	Click <span style="border: 1px solid blue; padding: 0 5px;">GO</span>
<b>EPAF BODY</b>	
<b>EMPLOYEE INFORMATION (Required fields in PEAEMPL)</b>	
Current Hire Date	Employee's expected first day of work
Home COAS	Enter 'G' for General Chart of Accounts
Home Organization	Enter the 5-digit organization (department) number to
Employee Class Code	A Banner classification that identifies the type of university employee. To scroll for a value, click the magnifying glass icon and click to select.
Distribution COA	Enter 'G' for General Chart of Accounts
Distribution Orgn	The 5-digit organization (department) number to which
Dept of Academic Rank	Click the magnifying glass icon to select the appropriate
Employee Status	'A; for Active
<b>ROUTING QUEUE</b>	The Routing Queue lists the persons or departments through which the EPAF must travel for approval.
	An approver must be selected for each level or the EPAF will error in the submission phase.
<b>COMMENT</b>	Record any additional information that would be helpful

Click **Save** to save the EPAF record

Click **Submit** to send the EPAF on its way. If error messages appear, make corrections as directed by the error messages, **Save** your changes and click **Submit** again.

## APPOINTMENT WITH END DATE

Instructions for:

**Appointment with End Date, EBTRXX**


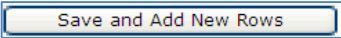
**Appointment with End Date C&G, EBTRCX**

Use this EPAF to hire faculty and non-faculty with stated-term appointments, for faculty for fall semester, for spring semester or for the entire academic year. Also used to hire EPA Temps and any permanent employees with known termination dates.

In our previous EPAF system, we had separate forms for Temp and Term appointments. These have now been combined into this “Appointment with End Date” EPAF, but the rules for setting up Temps & Terms in Banner *have not changed!* For permanent (benefits-earning) employees, annual salary should always be the full annual salary and factors and pays should always be 12 - even when the appointment is for less than a 12-month term.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	First day of first month employee will be paid
Approval Category	Appointment with End Date Or Appointment with End Date C&G
	Click <span style="border: 1px solid black; padding: 0 2px;">GO</span>
<b>SCREEN 2</b>	
New Job: Position – Suffix	Enter the 6-digit position number-suffix combination to which the employee is being hired  Suffix begins with 00.
PRESS [Tab]	<b>Confirm that Banner fills out the Org# and Description in the grid. DO NOT proceed if the grid is not completed! Your EPAF will not compile correctly.</b>
	Click <span style="border: 1px solid black; padding: 0 2px;">GO</span>
<b>EPAF BODY</b>	
<b>FIRST &amp; LAST WORK DATES</b>	
First Work Date	Same as beginning personnel date and should reflect the first day worked
Last Work Date	Same as the termination personnel date and should reflect the last day worked
<b>EPA TERM JOB:</b>	
Jobs Effective Date	Same as Query Date
Job Begin Date	Same as Query Date

Personnel Date	Employee's actual first day of work. This can be different from the Query/Effective /Begin dates.
Title	Formal title for this position
Annual Salary	Total amount the employee is to be paid for this assignment
FTE	The percent of time the employee will be working in this position. Full-time – 1.0, less than full-time; adjust accordingly. <b>PLEASE REFER TO THE FTE CONVERSION CHARTS PROVIDED IN APPENDIX D or APPENDIX E.</b>
Factor & Pays	The number of paychecks the employee will receive. These data fields are always the same
Timesheet Orgn	The 5-digit organization to which the employee will report time &/or leave. Must be assigned in Banner, even if employee does not earn leave.
Contract type	Select <i>Primary</i> if this is the first assigned job for the employee (if they do not currently have another job at the university). Select <i>Secondary</i> if the employee already has a current assignment at the university. (Do not select <i>Overload</i> as it is used for Add-pay actions).
Job Change Reason	This code indicates why this job record was created, or changed, and what if any additional actions need to be taken depending on the specified Jobs Effective and Personnel Dates. Default value is 'APT'B' – Appointment Begins. See Appendix A for a complete listing of Job Change Reasons.
<b>LABOR DISTRIBUTION:</b> New effective date Funding	Same as the query date The funding shown is the default funding for the position. If you need to change the base funding, follow instructions on page <a href="#">19</a>
<b>JOB TERMINATION:</b> Effective date	The last day of the last month the employee will be paid
Personnel Date	The employee's actual last work date. This can be different from the Termination Effective Date
Job status	Defaults to 'T' (Terminated)
Job change reason	Defaults to APTN - Appointment Ends

<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description. At the HR-OFFICE approval level, select the appropriate HR office from the drop-down list, depending on the designation of the employee as Faculty, Non-Faculty, SPA, Grad Student or Undergrad Student. An approver must be selected for each level or the EPAF will error in the submission phase.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	<p>Free text. Enter any information necessary to explain your personnel action.</p>

Click **Save** to save the EPAF record

Click **Submit** to send the EPAF on its way. If error messages appear, make corrections as directed by the error messages, **Save** your changes and click **Submit** again.


## ONGOING APPOINTMENT

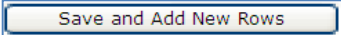
Instructions for:

**Ongoing Appointment**  
**Ongoing Appointment C&G**

Used to hire “at-will” non-faculty, or tenured faculty paid in 12 installments.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	First day of first month employee will be paid
Approval Category	Ongoing Appointment Or Ongoing Appointment C&G Click <b>GO</b>
<b>SCREEN 2</b>	
New Job: Position – Suffix	Enter the 6-digit position number-suffix combination to which the employee is being hired
PRESS [Tab]	<b>Confirm that Banner fills out the Org# and Description in the grid. DO NOT proceed if the grid is not completed! Your EPAF will not compile correctly.</b> Click <b>GO</b>

<b>EPAF BODY</b>	
<b>EPA BENEFITS</b>	
<b>EARNING JOB:</b> Jobs Effective Date	Same as Query Date
Job Begin Date	Same as Query Date
Personnel Date	Employee's actual first day of work. This can be different from the Query/Effective /Begin dates.
Title	Formal title for this position
Annual Salary	Total amount the employee is to be paid for this assignment
FTE	The percent of time the employee will be working in this position. Full-time – 1.0, less than full-time; adjust accordingly. <b>PLEASE REFER TO THE FTE CONVERSION CHARTS PROVIDED IN APPENDIX D or APPENDIX E.</b>
Timesheet Orgn	The 5-digit organization to which the employee will report time &/or leave. Must be assigned in Banner, even if employee does not earn leave or report hours.
Contract type	Select <i>Primary</i> if this is the first assigned job for the employee (if they do not currently have another job at the university). Select <i>Secondary</i> if the employee already has a current assignment at the university. (Do not select <i>Overload</i> as it is used for Add-pay actions).
Job Change Reason	This code indicates why this job record was created, or changed, and what if any additional actions need to be taken depending on the specified Jobs Effective and Personnel Dates. The default value is APTB – Appointment Begins, but it can be changed. See Appendix A for a complete listing of Job Change Reasons.
<b>LABOR DISTRIBUTION:</b> New effective date Funding	Same as the query date The funding shown is the default funding for the position. If you need to change the base funding, follow instructions on page <a href="#">19</a>
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description. At the HR-OFFICE approval level, select the appropriate HR office from the drop-down list, depending on the designation of the employee as Faculty, Non-Faculty, SPA, Grad Student or Undergrad Student. An approver must be selected for each level or the EPAF will error in the submission phase.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in</p>

	<p>a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	Free text. Record any additional information that would be helpful to the Approvers who process your EPAF. Do not assume that they know all the circumstances surrounding your personnel action!

Click **[Save]**

Address any errors by following the Error Messages

Click **[Submit]** to send the EPAF on its way!




## REACTIVATE APPOINTMENT WITH END DATE

Instructions for:

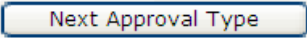

**Reactivate Appointment with End Date**

**Reactivate Appointment with End Date C&G**



Reactivation EPAFs are used when re-hiring an employee to the same stated-term position-suffix, in the same Org, whether or not it was the most recent job the employee had. You can only reactivate a position that is showing a status of “Terminated”, and you can only reactive one that is assigned to your organization (department).

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	First day of first month employee will be paid
Approval Category	Reactivate Appointment with End Date Or Reactivate Appointment with End Date C&G Click 
<b>SCREEN 2</b>	
New Job: Position – Suffix	<p><b><u>DO NOT</u></b> manually enter the position number and suffix to which the employee is being reappointed, rather</p> <p>Click  to display previous job history</p> <p>Select the relevant position by clicking the  in the right-most column of the grid</p>



	! Don't click the  button – it's designed for a feature we don't use at UNCG, and clicking on it gets you stuck in a loop.
	Click 
<b>EPAF BODY</b>	
<b>FIRST &amp; LAST WORK DATES</b>	
First Work Date	Same as personnel date and should reflect the first day worked
Last Work Date	Same as personnel date and should reflect the last day worked
<b>REACTIVATE A PREVIOUS JOB:</b>	
Jobs Effective Date	Same as Query Date
Personnel Date	Employee's actual first day of work. This can be different from the Query/Effective /Begin dates.
Title	Formal title for this position
Annual Salary	Total amount the employee is to be paid for this assignment
FTE	The percent of time the employee will be working in this position. Full-time – 1.0, less than full-time; adjust accordingly. <b>PLEASE REFER TO THE FTE CONVERSION CHARTS PROVIDED IN APPENDIX D or APPENDIX E.</b>
Factor & Pays	The number of paychecks the employee will receive. These data fields are always the same
Timesheet Orgn	The 5-digit organization to which the employee will report time &/or leave. Must be assigned in Banner, even if employee does not earn leave or report hours.
Contract Type	Select <i>Primary</i> if this is the first assigned job for the employee (if they do not currently have another job at the university). Select <i>Secondary</i> if the employee already has a current assignment at the university. (Do not select <i>Overload</i> as it is used for Add-pay actions).
Job Change Reason	This code indicates why this job record was created, or changed, and what if any additional actions need to be taken depending on the specified Jobs Effective and Personnel Dates. The default value is REAB – Reappointment Begins, but it can be changed. A list of Job Change Reasons can be found in Appendix A.
Job Status	Default value is 'A' - Active
<b>LABOR DISTRIBUTION</b>	
New Effective Date	Same as Query Date

Funding	The funding shown is the default funding for the position. If you need to change the base funding, follow instructions on page <a href="#">19</a> .
<b>JOB TERMINATION</b> Jobs Effective Date	The last day of the last month the employee is to be paid

Personnel Date	The employee's actual last work date. This can be different from the Termination Effective Date
Job status	Defaults to 'T' (Terminated)
Job change reason	Defaults to APTN (Appointment Termination)
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description. At the HR-OFFICE approval level, select the appropriate HR office from the drop-down list, depending on the designation of the employee as Faculty, Non-Faculty, SPA, Grad Student or Undergrad Student. An approver must be selected for each level or the EPAF will error in the submission phase.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	Free text. Record any additional information that would be helpful to the Approvers who process your EPAF. Do not assume that they know all the circumstances surrounding your personnel action!

Click [**Save**]

Address any errors by following the Error Messages

Click [**Submit**] to send the EPAF on its way!

## ADD-PAY

Instructions for:

**Add Pay**

**Add Pay C&G**

Add Pay EPAFs allow departments to electronically initiate and submit supplemental pay actions for two categories of **ADDitional PAY**. The first is for temporary increases in responsibility during the employee's normal work hours or contract period. An example is an administrative assignment. The second pay category is for extra duties performed outside of normal duties and hours in addition to those spent on normal job duties. Teaching overloads, summer session assignments, and course development are three good examples for the second category.

Each form is for a specified period of time at a flat rate of pay and very specific data to document the "additional" duties is required. An Originator of an Add-Pay EPAF should refer to "Guidelines for Implementation of the UNCG Policy on Compensation beyond Contract for Faculty and EPA Non-facultyEmployees", found on-line at [http://provost.uncg.edu/documents/personnel/compensation\\_guidelines.pdf](http://provost.uncg.edu/documents/personnel/compensation_guidelines.pdf) to ensure compliance.

### **SPECIAL NOTE: 9 Month Faculty Add Pay**

Summer salary is considered extra work outside the faculty member's normal working hours or contract period. Most faculty members are on a 9 month contract, considered to be from the middle of August to the middle of May. The period of non-contract is considered to be 5/14-8/15.

A faculty member can earn up to a total of 33% of their annual salary, from all sources, during the summer months. All sources include, but are not limited to, special assignments in preparation for administrative or regular duties, summer session assignments, grant activity, teaching overloads, continuing education activity, workshop participation, and course development.

For the period 5/16-5/31, a 9 month faculty member can earn up to  $\frac{1}{2}$  of  $\frac{1}{9}$  of their annual salary. This can be paid in the May check, as long as the EPAF reaches the Provost's Queue prior to the May payroll deadline.

For the period 6/1-6/30, a 9 month faculty member can earn up to  $\frac{1}{9}$  of their annual salary. This can be paid in the June check, as long as the EPAF reaches the Provost's Queue prior to the June payroll deadline.

For the period 7/1-7/31, a 9 month faculty member can earn up to  $\frac{1}{9}$  of their annual salary. This can be paid in the July check, as long as the EPAF reaches the Provost's Queue prior to the July payroll deadline.


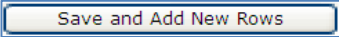




For the period 8/1-8/15, a 9 month faculty member can earn up to  $\frac{1}{2}$  of  $\frac{1}{9}$  of their annual


salary. This can be paid in the August check as long as the EPAF reaches the Provost's Queue prior to the August payroll deadline.

**Note** these EPAFs may be used for supplemental pay to an SPA employee. If that employee is not exempt from the Fair Labor Standards Act (FLSA) then compensation paid would be subject to that Act's overtime requirements. EPA-HR forwards a copy of EPA Add Pay initiated for SPA employees to SPA-HRS and that office applies FLSA overtime requirements, if applicable to that employee.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	First day of first month employee will be paid
Approval Category	Add Pay Or Add Pay C&G
	Click <input type="button" value="GO"/>
<b>SCREEN 2</b>	
New Job: Position – Suffix	Enter the 6-digit position number-suffix combination to which the employee is being hired. <b>Suffix: Add-pay actions use a suffix of A#.</b> The first add-pay on a given position is numbered A0. Subsequent, concurrent add-pay actions for the same position increment by one (A1, A2, A3...). If the employee has had an Add-Pay in the past, under this same position, please use a <i>reactivate</i> EPAF
PRESS [Tab]	<b>Confirm that Banner fills out the Org# and Description in the grid. DO NOT proceed if the grid is not completed! Your EPAF will not compile correctly.</b>
	Click <input type="button" value="GO"/>
<b>EPAF BODY</b>	
<b>ADD PAY JOB:</b>	
Jobs Effective Date	Same as Query Date
Job Begin Date	Same as Query Date
Personnel Date	Employee's actual first day of work on these additional duties
Annual Salary	Total amount the employee is to be paid for this add-pay
FTE	The percent of time the employee will be working in this position. Full-time – 1.0, less than full-time; adjust accordingly. <b>PLEASE REFER TO THE FTE CONVERSION CHARTS PROVIDED IN APPENDIX D or APPENDIX E.</b>
Factor & Pays	The number of paychecks the employee will receive. These data fields are always the same.
Contract Type	The default value is 'O' - Overload
Job Change Reason	This code indicates why this job record was created, or changed, and what if any additional actions need to be taken depending on the specified Jobs Effective and

	Personnel Dates. The default value is ADDB –Add Pay Begins, but it can be changed. A list of Job Change Reasons can be found in Appendix A.
<b>DEFAULT EARNINGS</b>	
New Value Effective Date	Day one of first installment month.
Earnings	Earnings will usually be one of the codes below 310 Administrative Duties 320 Research Grant 330 Extension Instruction 340 Other Special Duties 966 Campus Living Allow-Non Cash
Hours or Units per Pay The remaining columns may be left blank	Hours or Units = 1. The remaining columns may be left blank
End Date	Same Date as the Job Termination Effective Date which is the last day of the last month the employee is to be paid
<b>LABOR DISTRIBUTION</b>	
New Effective Date	Same as Query Date
Funding	The funding shown is the default funding for the position. If you need to change the base funding, follow instructions on page 19.
<b>JOB TERMINATION</b>	
Jobs Effective Date	The last day of the last month the employee is to be paid

Personnel Date	The employee's actual last work date on these additional duties. This can be different from the Termination Effective Date.
Job Status	Defaults to 'T' - Terminated
Job change reason	Defaults to ADDN – Add Pay Ends
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description. At the HR-OFFICE approval level, select the appropriate HR office from the drop-down list, depending on the designation of the employee as Faculty, Non-Faculty, SPA, Grad Student or Undergrad Student. An approver must be selected for each level or the EPAF will error in the submission phase.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	<p>Per the <u>Exception Pay Policy</u> and as determined by UNC Policy 300.2.13 the following information is to be included for EPA Add Pay assignments:</p> <ul style="list-style-type: none"> <li> A justification for the additional work (purpose) <ul style="list-style-type: none"> <li> A description of work to be performed (overload teaching, grant work, administrative assignment, etcetera.</li> </ul> </li> <li> The relationship of the proposed activity to the employee's normal job responsibilities (additional course required, summer grant work, interim department head/chair while head/chair on research assignment, etcetera).</li> <li> Time period during which the additional duties are to</li> </ul>

	 The basis for determining salary for this activity (negotiated flat rate for overload teaching, salary established for grant PI (Principal Investigator), at UNCG the formula for head/chair assignments is 1/9 of faculty member's annual salary, etcetera.
--	--

Click [**Save**]

Address any errors by following the Error Messages

Click [**Submit**] to send the EPAF on its way!


## REACTIVATE ADD PAY

Instructions for:

**Reactivate Add Pay**


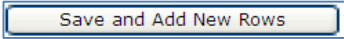
**Reactivate Add Pay C&G**

This EPAF is used to rehire an employee to the same add-pay position-suffix, in the same org, whether or not it was the most recent job the employee had. These EPAFs reuse some critical data from the previous job, meaning you have less data to enter. You can only reactivate an add-pay position that is showing a status of “Terminated”, and you can only reactive one that is assigned to your organization (department).

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	First day of first month employee will be paid
Approval Category	Reactivate Add Pay Or Reactivate Add Pay C&G
	Click <span style="border: 1px solid black; padding: 2px 5px;">GO</span>
<b>SCREEN 2</b>	
New Job: Position – Suffix	<p><b><span style="color: red;">DO NOT</span></b> manually enter the position number and suffix to which the employee is being reactivated, rather</p> <p>Click <span style="border: 1px solid black; padding: 2px 5px;">Show All Jobs</span> to display previous job history</p> <p>Select the relevant position by clicking the  in the right-most column of the grid. <i>Choose the lowest (number) suffixed position that is not currently being used.</i></p> <p><b>!</b> Don't click the <span style="border: 1px solid black; padding: 2px 5px;">Next Approval Type</span> button – it's designed for a feature we don't use at UNCG, and clicking on it gets you stuck in a loop.</p>
	Click <span style="border: 1px solid black; padding: 2px 5px;">GO</span>
<b>EPAF BODY</b>	
<b>REACTIVATE A PREVIOUS JOB:</b>	



Jobs Effective Date	Same as Query Date
Personnel Date	Employee's actual first day of work on these additional duties. This can be (and usually <i>is</i> ) different from the Query Date.
Annual Salary	Total amount the employee is to be paid for this add-pay
FTE	The percent of time the employee will be working in this position. Full-time – 1.0, less than full-time; adjust accordingly. <b>PLEASE REFER TO THE FTE CONVERSION CHARTS PROVIDED IN APPENDIX D or APPENDIX E.</b>
Factor & Pays	The number of paychecks the employee will receive. These data fields are always the same
Contract Type	The default value is 'O' - Overload
Job Change Reason	This code indicates why this job record was created, or changed, and what if any additional actions need to be taken depending on the specified Jobs Effective and Personnel Dates. The default value is ADDB –Add Pay Begins, but it can be changed. A list of Job Change Reasons can be found in Appendix A.
Accrue Leave	Default value is 'N' - No
Job Status	Default value is 'A' - Active
<b>DEFAULT EARNINGS</b> New Value Effective Date	Day one of first installment month.
Earnings	Earnings will usually be one of the codes below 310 Administrative Duties 320 Research Grant 330 Extension Instruction 340 Other Special Duties 966 Campus Living Allow-Non Cash
Hours or Units per Pay The remaining columns may be left blank	Hours or Units = 1. The remaining columns may be left blank
End Date	Same Date as the Job Termination Effective Date which is the last day of the last month the employee is to be paid
<b>LABOR DISTRIBUTION</b> New Effective Date	Same as Query Date
Funding	The funding shown is the default funding for the position. If you need to change the base funding, follow instructions on page <a href="#">19</a> .
<b>JOB TERMINATION</b> Jobs Effective Date	The date the add-pay installments stop. The last day of the last month the employee will be paid.

Personnel Date	The employee's actual last work date on these add-pay duties. This can be different from the Termination Effective Date
Job status	Defaults to 'T' (Terminated)
Job change reason	Defaults to APTN (Appointment Termination)
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description. At the HR-OFFICE approval level, select the appropriate HR office from the drop-down list, depending on the designation of the employee as Faculty, Non-Faculty, SPA, Grad Student or Undergrad Student. An approver must be selected for each level or the EPAF will error in the submission phase.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>

<p><b>COMMENT</b></p>	<p>Per the <u>Exception Pay Policy</u> and as determined by UNC Policy 300.2.13 the following information is to be included for EPA Add Pay assignments:</p> <ul style="list-style-type: none"> <li>✚ A justification for the additional work (purpose)</li> <li>✚ A description of work to be performed (overload teaching, grant work, administrative assignment, etcetera).</li> <li>✚ The relationship of the proposed activity to the employee's normal job responsibilities (additional course required, summer grant work, interim department head/chair while head/chair on research assignment, etcetera).</li> <li>✚ Time period during which the additional duties are to be performed (date/s of the work period)</li> <li>✚ The basis for determining salary for this activity (negotiated flat rate for overload teaching, salary established for grant PI (Principal Investigator), at UNCG the formula for head/chair assignments is 1/9 of faculty member's annual salary, etcetera).</li> </ul>
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Remember to **(Save)** EPAFs while initiating and correct any errors.  
Finally, proofread before clicking the **(Submit)** button.

## JOB LABOR DISTRIBUTION CHANGE

Instructions for:

### Job Labor Distribution Change Job Labor Distribution Change C&G


Use these EPAFs to change the funding source for an employee's salary expense. One very common example is charging a portion of an employee's salary to a grant fund that has been obtained. Whenever a salary is charged to more than one fund, it's called "split-funded", and you can split as much as is necessary, but UNCG has a policy that no one fund can be charged less than .05, (5%).

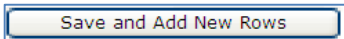
Permanent funding changes require the submission of an electronic PAF to the Budget Department so position records can be modified.

Job Labor Distribution Change EPAFs do not specify an ending date. Instead, a second EPAF must be initiated when the funding is to change again – even if the second "change" is thought of as reverting back to previous funding FOAPAL(s). In fact, since EPAFs can be effective dated far into the future, it would be more efficient to initiate a second EPAF to return the position to regular funding as soon as the first EPAF has been approved and applied.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	The first day of the first month the funding change is to take effect. You cannot back-date a funding change EPAF to a date prior to the last paycheck (Last Paid Date). For instance, if the funding change was to be made on June 1 <sup>st</sup> but that payroll has run and the employee paid, then the Jobs Effective date would be 07/01/YYYY
Approval Category	Job Labor Distribution Change Or Job Labor Distribution Change C&G
Click <span style="border: 1px solid black; padding: 2px;">GO</span>	
<b>SCREEN 2</b>	
New Job: Position – Suffix	<p><b><span style="color: red;">DO NOT</span></b> manually enter the position number and suffix that is being changed, instead</p> <p>Click <span style="border: 1px solid black; padding: 2px;">Show All Jobs</span> to display previous job history</p> <p>Select the relevant position by clicking the <span style="color: blue;">⦿</span> in the right-most column of the grid</p>
<p><b>!</b> Don't click the <span style="border: 1px solid black; padding: 2px;">Next Approval Type</span> button – it's designed for a feature we don't use at UNCG, and clicking on it gets you stuck in a loop.</p>	

Click [GO](#)

<b>EPAF BODY</b>	
<b>REACTIVATE A PREVIOUS JOB:</b>	
Jobs Effective Date	Same as Query Date
Personnel Date	The first day of the first month the change can be made effective. If you need to “back-date” your change, you can enter the first day of the first month it was <i>intended</i> to begin, in combination with a Job Change Reason that ends in a number (1, 2 or 3).
Job Change Reason	This code records the reason for the funding change. In addition, when the Personnel Date precedes the Jobs Effective Date, it indicates that adjustments need to be made to past records. A Job Change Reason helps clarify the necessary action. Codes ending in ‘1’ cue the Payroll Department to calculate retroactive adjustments. Codes ending in ‘2’ cue the Payroll Department to calculate a redistribution of past labor charges. Codes ending in ‘3’ cue the Payroll Department to make both a retroactive and redistribution adjustments. <b>See Appendix A for a complete listing of Job Change Reasons and an explanation of codes ending with a number</b>
<b>LABOR DISTRIBUTION</b>	
New Effective Date	Same as Query Date
Funding	<p>The funding shown is the current funding for the job. To make changes in this grid, enter the ‘G’ for Chart of Accounts, type in the Index field ONLY, and click the [Default from Index] button. DO NOT ENTER the FOAP fields manually. Banner will perform a look-up and return the corresponding fund, org and program numbers for the given Index, but not the account number – YOU must enter the account number manually. Full instructions for Labor Distribution grids are on page <a href="#">19</a>.</p> <p>Percentages can only be taken to 2 decimal places, so get as close as you can, but we understand it might not be the exact dollar amount when it pays. The total of all Percentages must = 100.</p>
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description. At the HR-OFFICE</p>

	<p>select the appropriate HR office from the drop-down list, depending on the designation of the employee as Faculty, Non-Faculty, SPA, Grad Student or Undergrad Student. An approver must be selected for each level or the EPAF will error in the submission phase.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	<p>Free text. Record any additional information that would be helpful to the Approvers who process your EPAF. Do not assume that they know all the circumstances surrounding your personnel action!</p>

Click [**Save**]

Address any errors by following the Error Messages

Click [**Submit**] to send the EPAF on its way!

## **FACULTY/STAFF/STUDENT CHANGING or TERMINATING JOB at UNCG** **FACULTY/STAFF/STUDENT TERMINATING JOB and LEAVING UNCG**

Instructions for:

**Faculty/Staff/Student Terminating Job and Leaving UNCG**  
**Faculty/Staff/Student Terminating Job and Leaving UNCG C&G**


**Faculty/Staff/Student Changing or Terminating Job at UNCG**  
**Faculty/Staff/Student Changing or Terminating Job at UNCG C&G**


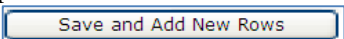
These EPAFs are used to terminate employee job records. Both sets of EPAFs do the same thing in Banner – they put a status of “Terminated” on the employee’s NBAJOBS record.

If the employee is leaving the university, never to work here again, use Terminating Job and Leaving UNCG. If the employee is leaving the job in your department in order to accept another position at UNCG, use the Changing or Terminating Job at UNCG EPAF to end their job.

**You can't add a Termination if one already exists!** If the employee has a future termination date already in Banner (as part of being on a stated-term appointment), it must be deleted (by the appropriate HR department) before you can proceed. For instance, when you hire a Lecturer, you supply a job termination date (the end of the semester) on the EPAF. If the Lecturer quits mid-term, you cannot submit an EPAF to terminate the job until the FACULTY office has deleted the original termination date. See page 6 for a full explanation.

## FACULTY/STAFF/STUDENT TERMINATING JOB and LEAVING UNCG


<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	Last day worked
Approval Category	Faculty/Staff/Student Changing or Terminating Job at UNCG Faculty/Staff/Student Changing or Terminating Job at UNCG C&G Or Faculty/Staff/Student Terminating Job and Leaving UNCG Faculty/Staff/Student Terminating Job and Leaving UNCG C&G
Click <b>GO</b>	
<b>SCREEN 2</b>	
<b>New Job:</b> Position – Suffix	<b>DO NOT</b> manually enter the position number and suffix for which the employee is being terminated. Instead, select the relevant position to terminate by clicking the  in the right-most column of the grid
Click <b>GO</b>	
<b>EPAF BODY</b>	
<b>LAST WORK DATE</b> Last Work Date	This date should be the same as the personnel date and reflect the last day worked.
<b>JOB TERMINATION</b> Jobs Effective Date	Last day worked
Personnel Date	Last day worked

Job Status	Default value is 'T' for Terminated
Job Change Reason	Select a reason from the List of Values that describes the reason for termination.
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description. At the HR-OFFICE approval level, select the appropriate HR office from the drop-down list, depending on the designation of the employee as Faculty, Non-Faculty, SPA, Grad Student or Undergrad Student. An approver must be selected for each level or the EPAF will error in the submission phase.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	Free text. Enter any additional information that will clarify the intent of this action.


Click [**Save**]


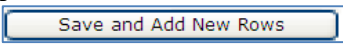
Click [**Submit**] to send the EPAF on its way.

## FACULTY/STAFF/STUDENT CHANGING or TERMINATING JOB at UNCG

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	Last day worked
Approval Category	Faculty/Staff/Student Changing or Terminating Job at UNCG Faculty/Staff/Student Changing or Terminating Job at UNCG C&G Or Faculty/Staff/Student Terminating Job and Leaving UNCG Faculty/Staff/Student Terminating Job and Leaving UNCG C&G
	Click 
<b>SCREEN 2</b>	



<b>New Job:</b> Position – Suffix	<b><u>DO NOT</u></b> manually enter the position number and suffix for which the employee is being terminated. Instead, select the relevant position to terminate by clicking the  in the right-most column of the grid
Click <span style="border: 1px solid black; padding: 0 5px;">GO</span>	
<b>EPAF BODY</b>	
<b>JOB TERMINATION</b> Jobs Effective Date	Last day worked
Personnel Date	Last day worked

Job Status	Default value is 'T' for Terminated
Job Change Reason	Select a reason from the List of Values that describes the reason for termination.
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description. At the HR-OFFICE approval level, select the appropriate HR office from the drop-down list, depending on the designation of the employee as Faculty, Non-Faculty, SPA, Grad Student or Undergrad Student. An approver must be selected for each level or the EPAF will error in the submission phase.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	Free text. Enter any additional information that will clarify the intent of this action.

Click [**Save**]

Click [**Submit**] to send the EPAF on its way.

## STUDENT DEPARTMENT HOURLY HIRE

This EPAF is used to hire UNCG undergraduate or graduate students to a position that pays an hourly rate, whether or not they have previously worked for the University. The student worker does not receive a paycheck unless they report hours worked.

You cannot create this EPAF on a first-time student employee until they have been to the Student Employment Office to complete their tax and I9 forms. Staff in the SEO Office complete the PPAIDEN and PEAEMPL records in Banner for the student. **Until these steps have been completed, you cannot successfully submit an EPAF to hire them.** The SEO staff strive to enter all student forms on the day they are initiated, so don't be too hasty in trying to submit your EPAF to hire.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	The student's first day of work. Really. Even if it was last month, before the EPAF deadline.
Approval Category	Student Department Hourly Hire
Click <span style="border: 1px solid black; padding: 0 5px;">GO</span>	
<b>SCREEN 2</b>	
<b>New Job:</b> Position – Suffix	<p>Enter the 6-digit pooled position number assigned to your department for student hires. Each department has 1 pooled position with a 'D' prefix, assigned by the Budget Department. The NBIPORG screen in INB displays all position numbers for a given department</p> <p>Suffix: If your department uses the suffix to identify a specific job (or job duties) use the appropriate suffix for the job. Otherwise the Suffix begins with 00. If the student already holds a <u>current</u> job in your department, and you are assigning an additional job with a different rate of pay, increment the suffix to 01, or 02, or 03, etc., as necessary.</p>
Click <span style="border: 1px solid black; padding: 0 5px;">GO</span>	

<b>EPAF BODY</b>	
<b>FIRST &amp; LAST WORK DATES</b>	
First Work Date	Same as personnel date and should reflect the first day worked
Last Work Date	Same as personnel date and should reflect the last day worked
<b>STUDENT EMPLOYEE INFORMATION</b>	
Employee Class Code	Enter 'UH' for Undergraduate Hourly or 'GH' for Graduate Hourly
Home Organization	Enter the 5-digit department number to which the student will be primarily assigned
Distribution Orgn	Same as Home Organization
I9 Form Indicator	You cannot hire a student unless they present you with the Yellow I9 card provided by the Career Services Center. If the Current Value is 'Received' (an I9 is already on record) simply repeat the information under New Value, or select 'Received' from the drop-down list of values. <b>If the employee has worked previously at UNCG, but in another department, you cannot see the current I9 information. You'll have to call the Student Employment Office, or the Human Resource Services department to have someone with security access read you the I9 Form Indicator &amp; I9 Date from the student's PEAEMPL screen. What you enter on the EPAF <u>must</u> match what's already in Banner</b>
I9 Date MM/DD/YYYY	Enter the date shown on the yellow I9 card – the date of original presentation to the Student Employment Office. If the Current Value column is already showing a valid date, simply repeat that date (See <b>note in red</b> above)
<b>DEPARTMENTAL STUDENT HOURLY RATE</b>	
Jobs Effective Date	Same as Query Date. First day student worked, or will work.
Job Begin Date	Same as Query Date
Personnel Date	Same as Query Date
Employee Class Code	Repeat what was entered above: UH – Undergraduate Hourly GH – Graduate Hourly
Hourly Rate	Hourly wage for the employee
FTE	The percent of time the employee will be working in this position. Full-time – 1.0, less than full-time; adjust accordingly. <b>PLEASE REFER TO THE FTE CONVERSION CHARTS PROVIDED IN APPENDIX D or APPENDIX E.</b>
Timesheet Orgn	The org to which the student will report time. Enter the appropriate Org number for your departmental timekeeping needs.

Contract type	Select <i>Primary</i> if this is the student's first active job. Select <i>Secondary</i> if the student already has at least one active job assignment
Job Change Reason	Default value is APTB – Appointment Begins

Accrue Leave	Default value is 'N' – <i>No</i> because everyone knows students don't earn leave!
<b>LABOR DISTRIBUTION</b>	
New Effective Date	Same as Query Date
Funding	Pooled position for student employees default to state funds. If you need to pay otherwise: to make changes in this grid, enter the 'G' for Chart of Accounts, type in the Index field ONLY, and click the [Default from Index] button. DO NOT ENTER the FOAP fields manually. Banner will perform a look-up and return the corresponding fund, org and program numbers for the given Index, but not the account number – YOU must enter the account number manually. Full instructions for Labor Distribution grids are on page <a href="#">19</a>
<b>JOB TERMINATION</b>	
Jobs Effective Date	A June 10 <sup>th</sup> date will default in to this field. The date is changeable if you know the student's employment will end on a date other than June 10 <sup>th</sup> .
Personnel Date	A June 10 <sup>th</sup> date will default in to this field. The date is changeable if you know the student's actual last work date is a date other than June 10 <sup>th</sup> .
Job status	Defaults to 'T' (Terminated)
Job change reason	Defaults to APTN (Appointment Termination)

Click **Save**

Address any errors or warnings

Click **Submit**

Address any errors or warnings

## STUDENT DEPARTMENT HOURLY REACTIVATE

This EPAF is used to reappoint a student worker to the same job they previously held. It is recommended that you use this EPAF to re-instate your student workers when their job has been terminated by our annual PZPTSTU (Global Student Job Termination) process.

If you are in a department that employees a large number of students, and assigns multiple jobs with differing pay rates, this EPAF allows you to assign meaning to the position suffix. Here's how it works:

Assign a suffix number to each individual student job in your department–

- 00 – Student Caller
- 01 – Supervisor
- 02 – Caller Guide
- 03 - .....

Now, when you first hire a student (using the Student Department Hourly Hire EPAF), give them the necessary suffix. Even if it's their first job, you can give them an '02' if they're a Caller Guide. Thereafter, you can re-activate the '02' job each time they return to work as a Caller Guide. Also, student EPAFs include a Title field, where you can enter the working title 'Caller Guide'. Now that we have more specific information in Banner, we can pull that data into helpful reports, or print timesheets with job titles, or any number of administrative reports to assist in managing a large population of student workers.


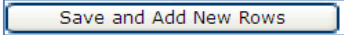
**NOTE:** If a student graduates, or quits school, in the middle of a student job, they must be terminated from the student job, as they are no longer eligible to be a "student employee".

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	The student's first day of work. Really. Even if it was last month, before the EPAF deadline.
Approval Category	Student Department Hourly Reactivate
Click <span style="border: 1px solid black; padding: 2px;">GO</span>	
<b>SCREEN 2</b>	
New Job: Position – Suffix	<p><b><span style="color: red;">DO NOT</span></b> manually enter the position number and suffix to which the employee is being reappointed, rather</p> <p>Click <span style="border: 1px solid black; padding: 2px;">Show All Jobs</span> to display previous job history</p> <p>Select the relevant position by clicking the <span style="color: blue;">⦿</span> in the right-most column of the grid</p>
Click <span style="border: 1px solid black; padding: 2px;">GO</span>	

<b>EPAF BODY</b>	
<b>FIRST &amp; LAST WORK DATES</b>	
First Work Date	Same as personnel date and should reflect the first day worked
Last Work Date	Same as personnel date and should reflect the last day worked
<b>STUDENT EMPLOYEE INFORMATION</b>	
Employee Class Code	Enter 'UH' for Undergraduate Hourly or 'GH' for Graduate Hourly
Home Organization	Enter the 5-digit department number to which the student will be primarily assigned
Distribution Orgn	Same as Home Organization
I9 Date MM/DD/YYYY	Enter the date shown on the yellow I9 card – the date of original presentation to the Student Employment Office. If the Current Value column is already showing a valid date, simply repeat that date.
<b>DEPARTMENTAL STUDENT REACTIVATE/CHANGE</b>	
Jobs Effective Date	Same as Query Date. First day student worked, or will work.
Job Begin Date	Same as Query Date
Personnel Date	Same as Query Date
Employee Class Code	Repeat what was entered above: UH – Undergraduate Hourly GH – Graduate Hourly
Hourly Rate	Hourly wage for the employee
FTE	The percent of time the employee will be working in this position. Full-time – 1.0, less than full-time; adjust accordingly. <b>PLEASE REFER TO THE FTE CONVERSION CHARTS PROVIDED IN APPENDIX D or APPENDIX E.</b>
Timesheet Orgn	The org to which the student will report time. Enter the appropriate Org number for your departmental timekeeping needs.
Contract type	Select <i>Primary</i> if this is the student's first active job. Select <i>Secondary</i> if the student already has at least one active job assignment
Job Change Reason	Default value is APTB – Appointment Begins
Accrue Leave	Default value is 'N' – No because everyone knows students don't earn leave!
Job Status	Defaults to 'A' - Active
<b>LABOR DISTRIBUTION</b>	
New Effective Date	Same as Query Date



Funding	<p>Pooled position for student employees default to state funds. If you need to pay otherwise: to make changes in this grid, enter the 'G' for Chart of Accounts, type in the Index field ONLY, and click the [Default from Index] button. DO NOT ENTER the FOAP fields manually. Banner will perform a look-up and return the corresponding fund, org and program numbers for the given Index, but not the account number – YOU must</p>
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	enter the account number manually. Full instructions for Labor Distribution grids are on page <a href="#">19</a>
<b>JOB TERMINATION</b> Jobs Effective Date	A June 10 <sup>th</sup> date will default in to this field. The date is changeable if you know the student's employment will end on a date other than June 10 <sup>th</sup> .
Personnel Date	A June 10 <sup>th</sup> date will default in to this field. The date is changeable if you know the student's actual last work date is a date other than June 10 <sup>th</sup> .
Job status	Defaults to 'T' (Terminated)
Job change reason	Defaults to APTN (Appointment Termination)
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description. At the HR-OFFICE approval level, select the appropriate HR office from the drop-down list, depending on the designation of the employee as Grad Student or Undergrad Student. An approver must be selected for each level or the EPAF will error in the submission phase.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	Free text. Explain yourself! Add any detail that might assist approvers in understanding your personnel action.

Click **Save**

Address any errors or warnings

Click **Submit**

Address any errors or warnings

## STUDENT DEPARTMENT FLAT PAY


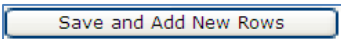
This EPAF assigns a job for which the total salary is already known. Instead of reporting hours worked to generate a paycheck, a student in a flat-pay job gets a specified amount of money each month. EPAFs for Flat-Pay job assignments include a Job Termination section because the amount of money to be paid is absolute. (EPAFs for Hourly-Rate job assignments do not include Job Termination sections).

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	The first day of the first month the employee is to be paid
Approval Category	Student Department Flat Pay
Click <a href="#">GO</a>	
<b>SCREEN 2</b>	
<b>New Job:</b> Position – Suffix	<p>Enter the 6-digit pooled position number assigned to your department for student flat pay. Each department has 1 pooled position with a 'F' prefix, assigned by the Budget Department. The NBIPORG screen in INB displays all position numbers for a given department</p> <p>Add the appropriate Suffix – 00 if your department does not assign meaning to suffixes, or use your assigned suffix</p>
Click <a href="#">GO</a>	

<b>EPAF BODY</b>	
<b>FIRST &amp; LAST WORK DATES</b>	
First Work Date	Same as personnel date and should reflect the first day worked
Last Work Date	Same as personnel date and should reflect the last day worked
<b>STUDENT EMPLOYEE INFORMATION</b>	
Employee Class Code	A two-letter abbreviation for the classification, or type of employee. UF – Undergraduate Flat Pay
Home Organization	Enter the 5-digit department number to which the student will be primarily assigned
Distribution Orgn	Same as Home Organization
I9 Form Indicator	You cannot hire a student unless they present you with the Yellow I9 card provided by the Career Services Center. If the Current Value is 'Received' (an I9 is already on record) simply repeat the information under New Value, or select 'Received' from the drop-down list of values. <b>If the employee has worked previously at UNCG, but in another department, you cannot see the current I9 information. You'll have to call the Student Employment Office, or the Human Resource Services department to have someone with security access read you the I9 Form Indicator &amp; I9 Date from the student's PEAEMPL screen. What you enter on the EPAF <u>must</u> match what's already in Banner</b>
I9 Date MM/DD/YYYY	Enter the date shown on the yellow I9 card – the date of original presentation to the Student Employment Office. If the Current Value column is already showing a valid date, simply repeat that date (See <b>note in red</b> above)
<b>DEPARTMENTAL STUDENT FLAT PAY</b>	
Jobs Effective Date	Same as Query Date. First day of the first month the student will be paid.
Job Begin Date	Same as Query Date
Personnel Date	The first day the student worked at this assignment
Employee Class Code	Repeat what was entered above: UF – Undergraduate Hourly
Annual Salary	Total amount to be paid for this assignment
FTE	The percent of time the employee will be working in this position. Full-time – 1.0, less than full-time; adjust accordingly. <b>PLEASE REFER TO THE FTE CONVERSION CHARTS PROVIDED IN APPENDIX D or APPENDIX E.</b>
Factor & Pays	The number of paychecks the student will receive. Factor & Pays are always the same number.

Timesheet Orgn	The Org to which the student would report time, if they reported time. Even though no hours will be entered to generate a paycheck for this employee, Banner still wants a Timesheet Org designated.
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Contract type	Select <i>Primary</i> if this is the student's first active job. Select <i>Secondary</i> if the student already has at least one active job assignment
Job Change Reason	Default value is APTB – Appointment Begins
Accrue Leave	Default value is 'N' – <i>No</i> because everyone knows students don't earn leave!
<b>LABOR DISTRIBUTION</b>	
New Effective Date	Same as Query Date
Funding	Pooled position for student employees default to state funds. If you need to pay otherwise: to make changes in this grid, enter the 'G' for Chart of Accounts, type in the Index field ONLY, and click the [Default from Index] button. DO NOT ENTER the FOAP fields manually. Banner will perform a look-up and return the corresponding fund, org and program numbers for the given Index, but not the account number – YOU must enter the account number manually. Full instructions for Labor Distribution grids are on page <a href="#">19</a>
<b>JOB TERMINATION</b>	
Jobs Effective Date	The last day of the last month the student will be paid
<b>Personnel Date</b>	Last day the student worked on this assignment
Job Status	Default value is 'T' for Terminated

Job Change Reason	Defaults to 'APTN' - Appointment Ends
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description. At the HR-OFFICE approval level, select the appropriate HR office from the drop-down list, depending on the designation of the employee as Grad Student or Undergrad Student. An approver must be selected for each level or the EPAF will error in the submission phase.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	Free text. Add any detail that might assist approvers in understanding your personnel action.

Click **Save**


Address any errors or warnings


Click **Submit**

Address any errors or warnings


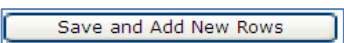
## STUDENT LABOR DISTRIBUTION and/or PAY RATE CHANGE

This EPAF allows you to modify an existing student job – to change the pay rate – to change the salary funding – or both.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	The first day of the first month the employee is to be paid
Approval Category	Student Labor Distribution and/or Pay Rate Change
Click 	

<b>SCREEN 2</b>	
<b>New Job:</b> Position – Suffix	<p><b><u>DO NOT</u></b> manually enter the position number and suffix that is being changed, instead</p> <p>Click <b>Show All Jobs</b> to display previous job history</p> <p>Select the relevant position by clicking the  in the right-most column of the grid</p> <p>Click <b>GO</b></p>
<b>EPAF BODY</b>	
<b>STUDENT HOURLY RATE CHANGE</b>	<b>If the pay rate is not changing (you are only changing the job funding) skip this section of the EPAF and proceed to Labor Distribution grid.</b>
Jobs Effective Date	First day of the first month this change will take effect
Personnel Date	Actual date of change
Timesheet Orgn	The org to which the student will report time. Enter the appropriate Org number for your departmental timekeeping needs.
Hourly Rate	The new hourly wage for the student
Job Change Reason	Default value is RATE – Hourly Rate Change Forward
<b>LABOR DISTRIBUTION</b>	<b>If the job funding is not changing (you are only changing the pay rate) skip this section.</b>
New Effective Date	Same as Query Date



Funding	<p>Pooled position for student employees default to state funds. If you need to pay otherwise: to make changes in this grid, enter the 'G' for Chart of Accounts, type in the Index field ONLY, and click the [Default from Index] button. DO NOT ENTER the FOAP fields manually. Banner will perform a look-up and return the corresponding fund, org and program numbers for the given Index, but not the account number – YOU must enter the account number manually. Full instructions for Labor Distribution grids are on page <a href="#">19</a></p>
ROUTING QUEUE	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description. At the HR-OFFICE approval level, select the appropriate HR office from the drop-down list, depending on the designation of the employee as Grad Student or Undergrad Student. An approver must be selected for each level or the EPAF will error in the submission phase.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
COMMENT	<p>Free text. Explain yourself! Add any detail that might assist approvers in understanding your personnel action.</p>

Click **Save**

Address any errors or warnings

Click **Submit**

Address any errors or warnings

## GRADUATE ASSISTANT HIRE

Instructions for:

**Grad Asst State Funded Hire**

**Grad Asst C&G Funded Hire**


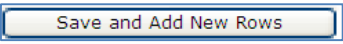




**Grad Asst Trust Funded Hire**

**!** If you are split-coding between a grant and a trust fund choose the EPAF with “C&G” in the title. If you are split-coding between a grant and state funds or between a trust and a state fund, complete a paper PD-7 to appoint.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	First day of first month employee will be paid
Approval Category	Grad Asst State Funded Hire Grad Asst C&G Funded Hire Grad Asst Trust Funded Hire
	Click <span style="border: 1px solid black; padding: 0 5px;">GO</span>
<b>SCREEN 2</b>	
New Job: Position – Suffix	<p>Enter the <b>6-digit</b> position number for the new job assignment. If you do not know the correct Position number, you can click the magnifying glass  to initiate a Banner Position Search. Use positions with a prefix of ‘G’ for grant &amp; trust funded appointments. Use permanent position numbers (490xxx, 590xxx etc.) for state funded appointments.</p> <p>Suffix begins with ‘00’</p> <p><b>Existing Jobs:</b> Any current job assignments for this employee. This information should be reviewed to determine the eligibility of the Graduate Student for employment. If their current job is twenty hours per week, the student is ineligible. If their current job is for only ten hours per week, then student is only eligible for another assignment with ten or less hours per week</p>
PRESS [Tab]	<p style="color: red;"><b>Confirm that Banner fills out the Org# and Description in the grid. DO NOT proceed if the grid is not completed! Your EPAF will not compile correctly.</b></p> <p style="text-align: center;">Click <span style="border: 1px solid black; padding: 0 5px;">GO</span></p>

<b>EPAF BODY</b>	
<b>FIRST &amp; LAST WORK DATES</b>	
First Work Date	Same as personnel date and should reflect the first day worked
Last Work Date	Same as personnel date and should reflect the last day worked
Jobs Effective Date	Same as Query Date
Job Begin Date	Same as Query Date
Personnel Date	The first day the employee works. Personnel Date fields are the “body date” – the date the body arrived on, or departed the campus.
Title	Enter only one value – Graduate Assistant, Research Assistant or Teaching Assistant. Do not combine these values, and do not abbreviate the words.
Annual Salary	Enter the total salary for the appointment
FTE	The percent of time the employee will be working in this position. Full-time – 1.0, less than full-time; adjust accordingly. <b>PLEASE REFER TO THE FTE CONVERSION CHARTS PROVIDED IN APPENDIX D or APPENDIX E.</b>
Factor & Pays	Enter the number of salary installments. Factor & Pays are always the same number.
Timesheet Orgn	All employees on Banner are assigned to a timekeeping org number, even if they do not earn or report leave. Enter the appropriate Org number for your departmental timekeeping needs, where the student is working. This organization is where the appointment letter will state the employee is working.
Contract Type	Defaults in as [Primary]. Change to Secondary ONLY if the student already has another active job
Job Change Reason	Default value is APTB (Appointment Begins)
Accrue Leave	Defaults to ‘N’ – No
<b>LABOR DISTRIBUTION</b>	
New Effective Date	Same as Query Date

Funding	<p>The funding shown is the current funding for the job. To make changes in this grid, enter the 'G' for Chart of Accounts, type in the Index field ONLY, and click the [Default from Index] button. DO NOT ENTER the FOAP fields manually. Banner will perform a look-up and return the corresponding fund, org and program numbers for the given Index, but not the account number – YOU must enter the account number manually. Full instructions for Labor Distribution grids are on page <a href="#">19</a></p> <p>Percentages can only be taken to 2 decimal places, so get as close as you can, but we understand it might not be the exact dollar amount when it pays. The total of all Percentages must = 100.</p>
<b>JOB TERMINATION</b>	

Jobs Effective Date	The last day of the last month this person will be paid
Personnel Date	The last day the employee works
Job Status	Defaults to 'T' – Terminated
Job Change Reason	Defaults to APTN (Appointment Termination)
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	<p>Include the following in the Comment block:</p> <ul style="list-style-type: none"> <li> Number of hours per week student will work</li> <li> Supervisor's name</li> <li> Any fellowships or scholarships awarded during the appointment period</li> <li> Tuition waiver information, if applicable</li> </ul>

Click [**Save**]

Correct any errors

Click [**Submit**] to send the EPAF on its way.

## GRADUATE ASSISTANT REACTIVATION


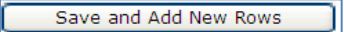



Instructions for:

**Grad Asst State Funded Reactivation**  
**Grad Asst C&G Funded Reactivation**  
**Grad Asst Trust Funded Reactivation**


This family of EPAFs is designed to reappoint a Graduate Assistant to the same position-suffix number they formally held. Select the EPAF based on the funding source to be used. When using a reactivation EPAF, do not manually enter the position-suffix number. Select the GA assignment you want to reactivate from those displayed under *Existing Jobs*. These EPAFs reuse some critical data from the previous job, meaning you have less data to enter.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	First day of first month employee will be paid
Approval Category	Grad Asst State Funded Reactivation Grad Asst C&G Funded Reactivation or Grad Asst Trust Funded Reactivation
Click <span style="border: 1px solid black; padding: 2px;">GO</span>	
<b>SCREEN 2</b>	
New Job: Position – Suffix	<p><b><u>DO NOT</u></b> manually enter the position number and suffix to which the employee is being reappointed, rather</p> <p>Click <span style="border: 1px solid black; padding: 2px;">Show All Jobs</span> to display previous job history</p> <p>Select the relevant position by clicking the <span style="color: blue;">⦿</span> in the right-most column of the grid</p> <p><b>!</b> Don't click the <span style="border: 1px solid black; padding: 2px; background-color: #f0f0f0;">Next Approval Type</span> button – it's designed for a feature we don't use at UNCG, and clicking on it gets you stuck in a loop.</p>
Click <span style="border: 1px solid black; padding: 2px;">GO</span>	

<b>EPAF BODY</b>	
<b>FIRST &amp; LAST WORK DATES</b>	
First Work Date	Same as personnel date and should reflect the first day worked
Last Work Date	Same as personnel date and should reflect the last day worked
<b>Grad Assistant Reactivate Job</b>	The values for the most recent position held will display in the column captioned ' <b>Current Value</b> '. Use this data as a guide for re-entering information for the reappointment.
Jobs Effective Date	Same as Query Date
Personnel Date	The first day the employee works. Personnel Date fields are the "body date" – the date the body arrived on, or departed the campus.
Title	Enter only one value – Graduate Assistant, Research Assistant or Teaching Assistant. Do not combine these values, and do not abbreviate the words.
Annual Salary	Enter the total salary for the appointment
FTE	The percent of time the employee will be working in this position. Full-time – 1.0, less than full-time; adjust accordingly. <b>PLEASE REFER TO THE FTE CONVERSION CHARTS PROVIDED IN APPENDIX D or APPENDIX E.</b>
Factor & Pays	Enter the number of salary installments. Factor & Pays are always the same number.
Timesheet Orgn	All employees on Banner are assigned to a timekeeping org number, even if they do not earn or report leave. Enter the appropriate Org number for your departmental timekeeping needs, where the student is working. This organization is where the appointment letter will state the employee is working.
Contract Type	Defaults in as [Primary]. Change to Secondary ONLY if the student already has another active job
Job Change Reason	Default value is REAB (Reappointment Begins)
Accrue Leave	Defaults to 'N' – No
<b>LABOR DISTRIBUTION</b>	
New Effective Date	Same as Query Date

Funding	<p>The funding shown is the current funding for the job. To make changes in this grid, enter the 'G' for Chart of Accounts, type in the Index field ONLY, and click the [Default from Index] button. DO NOT ENTER the FOAP fields manually. Banner will perform a look-up and return the corresponding fund, org and program numbers for the given Index, but not the account number – YOU must enter the account number manually. Full instructions for Labor Distribution grids are on page <a href="#">19</a></p> <p><b>Percentages can only be taken to 2 decimal places, so get as close as you can, but we understand it might not be the exact dollar amount when it pays. The total of all Percentages must = 100.</b></p>
<b>JOB TERMINATION</b>	
Jobs Effective Date	The last day of the last month this person will be paid
Personnel Date	The last day the employee works
Job Status	Defaults to 'T' – Terminated
Job Change Reason	Defaults to REAN (Reappointment Termination)
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	<p>Please include the following information in the Comment block:</p> <ul style="list-style-type: none"> <li> Number of hours per week student will work</li> <li> Supervisor's name</li> <li> Any fellowships or scholarships awarded during the appointment period</li> </ul>



	 Tuition waiver information, if applicable
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Click [**Save**]

Correct any errors

Click [**Submit**] to send the EPAF on its way.

## GRADUATE ASSISTANT ADD-PAY

Instructions for:

**Grad Asst State Funded Add Pay**

**Grad Asst C&G Funded Add Pay**


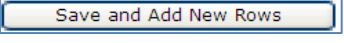
**Grad Asst Trust Funded Add Pay**

Follow the General Instructions for completing the New EPAF Person Selection Screen  
Select the EPAF based on the funding source to be used.

**! Contracts & Grants routing trumps all others!** If you are split-coding between a grant and a trust fund, choose the EPAF with “C&G” in the title.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	First day of first month the add-pay will be paid
Approval Category	Grad Asst State Funded Add Pay Grad Asst C&G Funded Add Pay or Grad Asst Trust Funded Add Pay
Click <span style="border: 1px solid black; padding: 0 5px;">GO</span>	
<b>SCREEN 2</b>	
New Job: Position – Suffix	<p>Enter the <b>6-digit</b> position number for the new job assignment. If you do not know the correct position number, access Banner form NBIPORG to view of list of positions assigned to your department. Use positions with a prefix of ‘G’ for grant &amp; trust funded appointments. Use permanent position numbers (490xxx, 590xxx etc.) for state funded appointments.</p> <p><b>Suffix:</b> Use A0, A1, A2 etc. for Add-Pays. The suffix is like a sequence number. Banner uses the suffix to distinguish between job records on an employee. For users (that’s you!) it makes Add-Pays easily identifiable on the various BannerHR screens.</p> <p>For a single add pay to a Graduate Assistant, the suffix will be A0. If there is a second add pay for the <b>same</b> month to the <b>same</b> student from the <b>same</b> position number the suffix will be A1. If there is a second add pay for the <b>same</b> month to the <b>same</b> student from a <b>different</b> position number the suffix will go back to A0.</p>
PRESS [Tab]	<b>Confirm that Banner fills out the Org# and Description in the grid. DO NOT proceed if the</b>

<p><b>grid is not completed! Your EPAF will not compile correctly.</b></p> <p>Click <input type="button" value="GO"/></p>	
<b>EPAF BODY</b>	
<b>GRADUATE ASSISTANT ADD PAY</b>	
Jobs Effective Date	Same as Query Date
Job Begin Date	Same as Query Date
Personnel Date	The first day the employee works (or will work) on the add-pay assignment
Annual Salary	Enter the total salary for the add-pay
FTE	The percent of time the employee will be working in this position. Full-time – 1.0, less than full-time; adjust accordingly. <b>PLEASE REFER TO THE FTE CONVERSION CHARTS PROVIDED IN APPENDIX D or APPENDIX E.</b>
Factor & Pays	Enter the number of salary installments. Factor & Pays are always the same number.
Timesheet Orgn	All employees on Banner are assigned to a timekeeping org number, even if they do not earn or report leave. Enter the appropriate Org number for your departmental timekeeping needs, where the student is working. This organization is where the appointment letter will state the employee is working.
Contract Type	Defaults in as [Overload] whenever you use a position suffix of A0, A1, A2, etc. for add-pays
Job Change Reason	Default value is ADDDB (Add Pay Assignment Begins)
Accrue Leave	Defaults to 'N' – No
<b>LABOR DISTRIBUTION</b> New Effective Date	Same as Query Date

Funding	<p>The funding shown is the current funding for the job. To make changes in this grid, enter the 'G' for Chart of Accounts, type in the Index field ONLY, and click the [Default from Index] button. DO NOT ENTER the FOAP fields manually. Banner will perform a look-up and return the corresponding fund, org and program numbers for the given Index, but not the account number – YOU must enter the account number manually. Full instructions for Labor Distribution grids are on page <a href="#">19</a></p> <p>Percentages can only be taken to 2 decimal places, so get as close as you can, but we understand it might not be the exact dollar amount when it pays. The total of all Percentages must = 100.</p>
<b>JOB TERMINATION</b>	
Jobs Effective Date	The last day of the last month this person will be paid
Personnel Date	The last day the employee works on the add-pay assignment
Job Status	Defaults to 'T' – Terminated
Job Change Reason	Defaults to ADDN (Add Pay Ends)
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	<p>Please use this section as you have in the past, on a PAS-5.</p> <p>Once you save, the comments will disappear from the EPAF and a little yellow box will appear beside the comment box. You may click on this box to view your</p>

	comments or rest assured they have been entered correctly
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Click **Save**

Address any errors or warnings

Click **Submit**

Address any errors or warnings

## GRADUATE ASSISTANT REACTIVATE ADD PAY

Instructions for:

**Grad Asst State Funded Reactivate Add Pay**


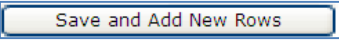
**Grad Asst C&G Funded Reactivate Add Pay**

**Grad Asst Trust Funded Reactivate Add Pay**

Add Pay Reactivation EPAFs are used when re-hiring a graduate assistant to the same add-pay position-suffix, in the same Org, whether or not it was the most recent job the employee had. These EPAFs reuse some critical data from the previous job, meaning you have less data to enter.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	First day of first month employee will be paid
Approval Category	Grad Asst State Funded Reactivate Add Pay Grad Asst C&G Funded Reactivate Add Pay or Grad Asst Trust Funded Reactive Add Pay
	Click <span style="border: 1px solid black; padding: 2px;">GO</span>
<b>SCREEN 2</b>	
New Job: Position – Suffix	<p><b><u>DO NOT</u></b> manually enter the position number and suffix to which the employee is being reappointed, rather</p> <p>Click <span style="border: 1px solid black; padding: 2px;">Show All Jobs</span> to display previous job history</p> <p>Select the add-pay to reactivate by clicking the <input checked="" type="radio"/> in the right-most column of the grid</p> <p><b>!</b> Don't click the <span style="border: 1px solid black; padding: 2px; background-color: #f0f0f0;">Next Approval Type</span> button – it's designed for a feature we don't use at UNCG, and clicking on it gets you stuck in a loop.</p> <p style="text-align: right;">Click <span style="border: 1px solid black; padding: 2px;">GO</span></p>

<b>EPAF BODY</b>	
<b>Grad Assistant Reactivate Add Pay</b>	
Jobs Effective Date	Same as Query Date
Personnel Date	The first day the employee works (or will work) on this add-pay assignment
Annual Salary	Enter the total salary for the add pay
FTE	The percent of time the employee will be working in this position. Full-time – 1.0, less than full-time; adjust accordingly. <b>PLEASE REFER TO THE FTE CONVERSION CHARTS PROVIDED IN APPENDIX D or APPENDIX E.</b>
Factor & Pays	Enter the number of salary installments. Factor & Pays are always the same number.
Timesheet Orgn	All employees on Banner are assigned to a timekeeping org number, even if they do not earn or report leave. Enter the appropriate Org number for your departmental timekeeping needs, where the student is working. This organization is where the appointment letter will state the employee is working.
Contract Type	Defaults in as [Overload]
Job Change Reason	Default value is ADDB (Add Pay Assignment Begins)
Accrue Leave	Defaults to 'N' – No
Job Status	Defaults to 'A' - Active
<b>LABOR DISTRIBUTION</b>	
<b>New Effective Date</b>	Same as Query Date
<b>Funding</b>	<p>The funding shown is the current funding for the job. To make changes in this grid, enter the 'G' for Chart of Accounts, type in the Index field ONLY, and click the [Default from Index] button. DO NOT ENTER the FOAP fields manually. Banner will perform a look-up and return the corresponding fund, org and program numbers for the given Index, but not the account number – YOU must enter the account number manually. Full instructions for Labor Distribution grids are on page <a href="#">19</a></p> <p><b>Percentages can only be taken to 2 decimal places, so get as close as you can, but we understand it might not be the exact dollar amount when it pays. The total of all Percentages must = 100.</b></p>
<b>JOB TERMINATION</b>	
<b>Jobs Effective Date</b>	The last day of the last month this person will be paid

<b>Personnel Date</b>	The last day the employee works
<b>Job Status</b>	Defaults to 'T' – Terminated
<b>Job Change Reason</b>	Defaults to ADDN (Add Pay Assignment Ends)
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	<p>Please use this section as you have in the past, on a PAS-5.</p> <p>Once you save, the comments will disappear from the EPAF and a little yellow box will appear beside the comment box. You may click on this box to view your comments or rest assured they have been entered correctly.</p>

Click **Save**

Address any errors or warnings

Click **Submit**

Address any errors or warnings



## SPA PROBATION TO PERMANENT

The SPA Probation to Permanent (SPAPTP) EPAF is used to change the status of a recently hired employee from Probation to Permanent, between month 3 and month 9 of employment. SPA employees will automatically be changed to a status of permanent after nine months of employment. This EPAF can be used to change this status prior to the completion of nine months of service (but not sooner than 3 months).

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	Enter the actual effective date of the status change
Approval Category	SPA Probation to Permanent
Click <span style="border: 1px solid black; padding: 2px;">GO</span>	
<b>SCREEN 2</b>	
New Job: Position – Suffix	<p><b><span style="color: red;">DO NOT</span></b> manually enter the position number and suffix for which the status is being changed.</p> <p>Instead select the relevant job by clicking the  in the right-most column of the grid</p>
Click <span style="border: 1px solid black; padding: 2px;">GO</span>	
<b>EPAF BODY</b>	
<b>NEW JOB CHANGE REASON</b>	
Jobs Effective Date	Same as Query Date
Personnel Date	Same as Query Date
Job Change Reason	Defaults to 'APTCH' – Appt Change-Prob to Perm
<b>PROBATIONARY END DATE</b>	
Probation End Date	Enter the date Permanent status begins
<b>ROUTING QUEUE</b>	
<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click <span style="border: 1px solid black; padding: 2px;">Save and Add New Rows</span> to add your</p>	

	<p>extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	<p>Please use this section to make any clarifying comments regarding your personnel action. Never assume that the Approvers in the Routing Queue know all the details of your action. Document what you are doing, and provide any other relevant information</p>

Click **Save**

Address any errors or warnings

Click **Submit**

Address any errors or warnings

## SPA JOB STATUS CHANGE

Instructions for:



**SPA Job Status Change, SPAJSX**


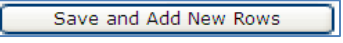
**SPA Job Status Change C&G, SPAJSC**

This EPAF is used to change the status of an employee's job, such as when an employee is placed on leave – with or without pay, and with or without benefits. Examples of such leave include absences for FMLA, military service, and absences due to injury or illness covered by Workers Compensation benefits.

**This same EPAF is used to reverse that action, when the employee returns from leave status.** To create the return EPAF, simply select “Active” for Job Status.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	Enter the last day the employee worked.
Approval Category	SPA Probation to Permanent
	Click <input type="button" value="GO"/>
<b>SCREEN 2</b>	
New Job: Position – Suffix	<p><b><u>DO NOT</u></b> manually enter the position number and suffix for which the status is being changed.</p> <p>Instead select the relevant job by clicking the <input type="radio"/> in the right-most column of the grid</p>
	Click <input type="button" value="GO"/>

EPAF BODY																						
EMPLOYEE JOB STATUS CHANGE																						
Jobs Effective Date	Same as Query Date																					
Personnel Date	The last day the employee worked																					
Job Status	<div>Click  to access the drop-down menu, and select the appropriate status:</div> <div><a href="#">Available Job Statuses</a></div> <div><b>Remove</b> – DO NOT USE</div> <div><b>Active</b> – returns the employee to normal, active, working status</div> <div><b>Leave without Pay, with Benefits</b> – FMLA, military leave without pay, workers compensation</div> <div><b>Leave without Pay, without Benefits</b> - employee is ineligible for FMLA, Worker’s Comp., or disability</div> <div><b>Leave with Pay, with Benefits</b> – DO NOT USE</div> <div><b>Leave with Partial Pay, with Benefits</b> – DO NOT USE</div> <div><b>Terminated</b> – DO NOT USE with this EPAF. Use the Terminate Job EPAF to terminate!</div>																					
Job Change Reason	<div>Click  to access the drop-down menu:</div> <div>These are the Job Change Reasons that are most logically used with an SPA Job Status change EPAF. Although you have access to the entire list of job change reasons, please select from the following values.</div> <table><tr><td>DISL</td><td>Disability Long</td><td>Disability Long</td></tr><tr><td>DISS</td><td>Disability Short</td><td>Disability Short</td></tr><tr><td>FMLB</td><td>FMLA Begin</td><td>FMLA Begin</td></tr><tr><td>FMLN</td><td>FMLA End</td><td>FMLA End</td></tr><tr><td>LWOB</td><td>LWOP Begin</td><td>LWOP Begin</td></tr><tr><td>LWON</td><td>LWOP End</td><td>LWOP End</td></tr><tr><td>WCOMP</td><td>Workers Compensation</td><td>Workers Compensation</td></tr></table>	DISL	Disability Long	Disability Long	DISS	Disability Short	Disability Short	FMLB	FMLA Begin	FMLA Begin	FMLN	FMLA End	FMLA End	LWOB	LWOP Begin	LWOP Begin	LWON	LWOP End	LWOP End	WCOMP	Workers Compensation	Workers Compensation
DISL	Disability Long	Disability Long																				
DISS	Disability Short	Disability Short																				
FMLB	FMLA Begin	FMLA Begin																				
FMLN	FMLA End	FMLA End																				
LWOB	LWOP Begin	LWOP Begin																				
LWON	LWOP End	LWOP End																				
WCOMP	Workers Compensation	Workers Compensation																				
ROUTING QUEUE	The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.																					

	<p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	<p>Please use this section to make any clarifying comments regarding your personnel action. Never assume that the Approvers in the Routing Queue know all the details of your action. Document what you are doing, and provide any other relevant information</p>

Click [**Save**]

Correct any errors

Click [**Submit**] to send the EPAF on its way.

## SPA TEMP HOURLY HIRE

Instructions for:

SPA Temp Hourly Hire

SPA Temp Hourly Hire C&G


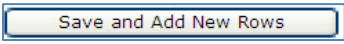
This EPAF is used to hire SPA Temporary hourly employees. If you are hiring an employee who has never worked at UNGC, they will not yet have a University ID number, so you cannot create an EPAF – you must complete the paper EAF form. This EPAF is for hires who already have been assigned a 9-digit University ID.

It is assumed if you are creating this EPAF, the employee has already been cleared with a Background Check. They cannot begin work until this has happened, and if you submit this EPAF early, you may have to void and re-create it to change the starting dates since the employee will not be allowed to work until the Background Check is complete.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	The employee's first day of work.
Approval Category	SPA Temp Hourly Hire or SPA Temp Hourly Hire C&G if funding with contracts or grants.

Click <input type="button" value="GO"/>	
<b>SCREEN 2</b>	
<b>New Job:</b> Position – Suffix	Enter the 6-digit pooled position number assigned to your department for student hires. Each department has 1 pooled position with a ‘T’ prefix, assigned by the Budget Department. The NBIPORG screen in INB displays all position numbers for a given department.
Click <input type="button" value="GO"/>	
<b>EPAF BODY</b>	
<b>FIRST &amp; LAST WORK DATES</b>	
First Work Date	Same as personnel date and should reflect the first day worked
Last Work Date	Same as personnel date and should reflect the last day worked
<b>TEMP EMPLOYEE INFORMATION</b>	
Employee Class Code	Defaults to “ST” for SPA Temporary
Home Organization	Enter the 5-digit department number to which the employee will be primarily assigned
Distribution Orgn	Same as Home Organization
<b>TEMP EMPLOYEE HOURLY INFORMATION</b>	
Jobs Effective Date	Same as Query Date. First day employee worked, or will work.
Job Begin Date	Same as Query Date
Personnel Date	Same as Query Date
Employee Class Code	Defaults, as above, to “ST” for SPA Temporary
Hourly Rate	Hourly wage for the employee
FTE	The percent of time the employee will be working in this position. Full-time – 1.0, less than full-time; adjust accordingly. <b>PLEASE REFER TO THE FTE CONVERSION CHARTS PROVIDED IN APPENDIX D or APPENDIX E.</b>
Timesheet Orgn	The org to which the employee will report time. Enter the appropriate Org number for your departmental timekeeping needs.
Contract type	Select <i>Primary</i> .
Job Change Reason	Default value is APTB – Appointment Begins
Accrue Leave	Default value is ‘N’ – <i>No</i>
<b>LABOR DISTRIBUTION</b>	
New Effective Date	Same as Query Date
<b>JOB TERMINATION</b>	
Jobs Effective Date	Enter the last day of employment – the date the SPA Temporary assignment will end
Personnel Date	Enter the last day of employment

Job Status	Defaults to 'T' for Terminated
Job Change Reason	Defaults to 'APTN' for Appointment End

Funding	<p>Pooled position for SPA Temps default to state funds. If you need to pay otherwise: to make changes in this grid, enter the 'G' for Chart of Accounts, type in the Index field ONLY, and click the [Default from Index] button. DO NOT ENTER the FOAP fields manually. Banner will perform a look-up and return the corresponding fund, org and program numbers for the given Index, but not the account number – YOU must enter the account number manually. Full instructions for Labor Distribution grids are on page <a href="#">19</a></p>
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	<p>Free text. Add any detail that might assist approvers in understanding your personnel action.</p>

Click **Save**

Address any errors or warnings

Click **Submit**

Address any errors or warnings

## SPA TEMP HOURLY REACTIVATE

### Instructions for

SPA Temporary Hourly Reactivate

SPA Temporary Hourly Reactivate, C&G


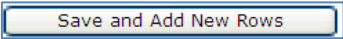
These EPAFs are used to reappoint an SPA Temporary employee to the same job they previously held. According to State statute, temporary employees who have worked twelve (12) consecutive months (either full or part time) must take at least a thirty-two (32) calendar day break before beginning or continuing a temporary assignment. Retirees are exempt from this limitation.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	Employee's first day of work. There must be at least 32 days between assignments, if the employee has worked for 12 consecutive months.
Approval Category	SPA Temp Hourly Reactivate Or SPA Temp Hourly Reactivate C&G
Click <span style="border: 1px solid black; padding: 0 5px;">GO</span>	
<b>SCREEN 2</b>	
<b>New Job:</b> Position – Suffix	<p><b><u>DO NOT</u></b> manually enter the position number and suffix to which the employee is being reappointed, rather</p> <p>Click <span style="border: 1px solid black; padding: 0 5px;">Show All Jobs</span> to display previous job history</p> <p>Select the relevant position by clicking the  in the right-most column of the grid</p>
Click <span style="border: 1px solid black; padding: 0 5px;">GO</span>	
<b>EPAF BODY</b>	
<b>FIRST &amp; LAST WORK DATES</b>	
First Work Date	Same as personnel date and should reflect the first day worked
Last Work Date	Same as personnel date and should reflect the last day worked
<b>TEMP EMPLOYEE INFORMATION</b>	
Employee Class Code	Defaults to 'ST' – SPA Temporary
Home Organization	Enter the 5-digit department number to which the employee will be primarily assigned
Distribution Orgn	Same as Home Organization



<b>TEMP HOURLY REACTIVATE</b>	
Jobs Effective Date	Same as Query Date. First day employee worked, or will work.
Personnel Date	Same as Query Date
Hourly Rate	Hourly wage for the employee
FTE	The percent of time the employee will be working in this position. Full-time – 1.0, less than full-time; adjust

	accordingly. <b>PLEASE REFER TO THE FTE CONVERSION CHARTS PROVIDED IN APPENDIX D or APPENDIX E.</b>
Timesheet Orgn	The org to which the employee will report time. Enter the appropriate Org number for your departmental timekeeping needs.
Contract type	Select <i>Primary</i>
Job Change Reason	Default value is APTB – Appointment Begins
Accrue Leave	Default value is ‘N’ – No
Job Status	Defaults to ‘A’ - Active
<b>LABOR DISTRIBUTION</b>	
New Effective Date	Same as Query Date

Funding	Pooled position for SPA Temps default to state funds. If you need to pay otherwise: to make changes in this grid, enter the 'G' for Chart of Accounts, type in the Index field ONLY, and click the [Default from Index] button. DO NOT ENTER the FOAP fields manually. Banner will perform a look-up and return the corresponding fund, org and program numbers for the given Index, but not the account number – YOU must enter the account number manually. Full instructions for Labor Distribution grids are on page <a href="#">19</a>
<b>JOB TERMINATION</b>	
Jobs Effective Date	The last day the employee will work
Personnel Date	The last day the employee will work
Job Status	Defaults to a value of 'T' – Terminated
Job Change Reason	Defaults to a value of APTN – Appointment Ends
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description. An approver must be selected for each level or the EPAF will error in the submission phase.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	Free text. Explain yourself! Add any detail that might assist approvers in understanding your personnel action.

Click **Save**

Address any errors or warnings


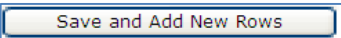
Click **Submit**

Address any errors or warnings

## SPA TEMP LABOR DISTRIBUTION and/or PAY RATE CHANGE

This EPAF allows you to modify an existing SPA Temporary job – to change the pay rate – to change the salary funding – or both.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	The 11 <sup>th</sup> day of the month this change will be effective. SPA Temps record time in a period that ends on the 10 <sup>th</sup> of each month, so new changes should take effect on the first day of a new time keeping period.
Approval Category	SPA Temp Labor Distribution and/or Pay Rate Change Or SPA Temp Labor Distribution and/or Pay Rate Change, C&G
Click <span style="border: 1px solid black; padding: 2px;">GO</span>	
<b>SCREEN 2</b>	
New Job: Position – Suffix	<p><b><u>DO NOT</u></b> manually enter the position number and suffix that is being changed, instead</p> <p>Click <span style="border: 1px solid black; padding: 2px;">Show All Jobs</span> to display previous job history</p> <p>Select the relevant position by clicking the <input type="radio"/> in the right-most column of the grid</p> <p style="text-align: right;">Click <span style="border: 1px solid black; padding: 2px;">GO</span></p>
<b>EPAF BODY</b>	
<b>TEMP HOURLY RATE CHANGE</b>	<b>If the pay rate is not changing (you are only changing the job funding) skip this section of the EPAF and proceed to Labor Distribution grid.</b>
Jobs Effective Date	The 11 <sup>th</sup> of the first month this change will take effect
Personnel Date	Same as Jobs Effective Date
Timesheet Orgn	The org to which the SPA Temp reports time.
Hourly Rate	The new hourly wage
Job Change Reason	Default value is LABOR – Labor Change Forward. If you are increasing the Hourly Rate with this EPAF, change this field to RATE – Hourly Rate Change Forward
<b>LABOR DISTRIBUTION</b>	<b>If the job funding is not changing (you are only changing the pay rate) skip this section.</b>
New Effective Date	Same as Query Date

Funding	Pooled position for SPA Temps default to state funds. If you need to pay otherwise: to make changes in this grid, enter the 'G' for Chart of Accounts, type in the Index field ONLY, and click the [Default from Index] button. DO NOT ENTER the FOAP fields manually. Banner will perform a look-up and return the corresponding fund, org and program numbers for the given Index, but not the account number – YOU must enter the account number manually. Full instructions for Labor Distribution grids are on page <a href="#">19</a>
<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description. An approver must be selected for each level or the EPAF will error in the submission phase.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click  to add your extra level. Banner will re-sort the list, based on the approval level number.</p> <p>You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38.</p>
<b>COMMENT</b>	Free text. Explain yourself! Add any detail that might assist approvers in understanding your personnel action.

Click **Save**

Address any errors or warnings

Click **Submit**


Address any errors or warnings

## TITLE CHANGE FOR FACULTY, STAFF & STUDENT

This EPAF allows departments to electronically initiate and submit forms to change an employee's administrative or working title.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	Enter the actual effective date of the title change
Approval Category	Title Change for Faculty, Staff & Student
Click <span style="border: 1px solid black; padding: 0 5px;">GO</span>	
<b>SCREEN 2</b>	
New Job: Position – Suffix	<p><b><u>DO NOT</u></b> manually enter the position number and suffix for which the status is being changed.</p> <p>Instead select the relevant job by clicking the  in the right-most column of the grid</p>
Click <span style="border: 1px solid black; padding: 0 5px;">GO</span>	
<b>EPAF BODY</b>	
Jobs Effective Date	Same as Query Date
Personnel Date	Same as Query Date
Title	Enter the employee's new title. Please don't abbreviate words.
Job Change Reason	Defaults to 'TTLC' – Title Change

Save and Add New Rows

<b>ROUTING QUEUE</b>	<p>The Routing Queue lists the persons or departments through which the EPAF must travel for approval. Functional offices have been assigned a generic user name so that Originators do not have to know which individual in a large office is assigned to process EPAFs.</p> <p>Select a name from each Approval Level using the magnifying glass icon  to the right of each approval level description. At the HR-OFFICE approval level, select the appropriate HR office from the drop-down list, depending on the designation of the employee as Grad Student or Undergrad Student. An approver must be selected for each level or the EPAF will error in the submission phase.</p> <p>You can add levels to accommodate special situations by selecting the Approval Level, User Name and Required Action in a blank line of the Routing Queue block. Click <a href="#">here</a> to add your extra level. Banner will re-sort the list, based on the approval level number.</p>
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	You can pre-select and save the names you need populated in the Routing Queue for any EPAF. For complete instructions, see Page 38..
<b>COMMENT</b>	Please use this section to make any clarifying comments regarding your personnel action. Never assume that the Approvers in the Routing Queue know all the details of your action. Document what you are doing, and provide any other relevant information

Click [**Save**]


Correct any errors

Click [**Submit**] to send the EPAF on its way.

## ORGANIZATIONAL CHANGE

**This EPAF is used ONLY at the end of a fiscal year when departments &/or divisions are reorganized and assigned new organization numbers**

This EPAF changes the Home Org, Check Distribution Org and Timekeeping Org fields in Banner.

<b>SCREEN 1</b>	
ID:	University ID# for the employee (begins with 88 or 89)
Query Date:	<u>ALWAYS</u> use a query date of <b>July 1<sup>st</sup> of the current year</b>
Approval Category	Organizational Change Click <b>GO</b>
<b>SCREEN 2</b>	
New Job: Position – Suffix	<b><u>DO NOT</u></b> manually enter the position number and suffix for which the status is being changed.  Instead select the relevant job by clicking the  in the right-most column of the grid Click <b>GO</b>





<b>EPAF BODY</b>	
Home Organization	Enter the new 5-digit organization number to which the employee will be assigned
Distribution Orgn	Enter the new 5-digit organization number to which the employee's W2 form will be delivered
Timesheet Orgn	Enter the new 5-digit organization number to which the employee will report time and/or leave
<b>ROUTING QUEUE</b>	Select a name from each approval level using the magnifying glass to access the list
<b>COMMENTS</b>	None necessary – this EPAF is self-explanatory!

 **[Save] & [Submit]**

## APPENDIX A: Job Change Reason Codes

PTRJCRE_CODE	PTRJCRE_DESC
ADDB	Add Pay Begin
ADDB1	Add Pay Begin w/Retro pay
ADDB2	Add Pay Begin w/Redistribution
ADDB3	Add Pay Begin w/Retro & Redist
ADDN	Add Pay End
APRO1	Acting Promotion Begin w/Retro
APRO2	Acting Promotion w/Redistribut
APRO3	Acting Promotion w/Retro&Redis
APROB	Acting Promotion Begin
APROE	Acting Promotion End
APTB	Appointment Begin
APTB1	Appointment Begin w/Retro pay
APTB2	Appointment Begin w/Redistribu
APTB3	Appointment Begin w/Retro&Redi
APTCH	Appt Change-Prob to Perm (SPA)
APTN	Appointment End
CBCL	Career Band Comp Level Change
CHGM	Change in months
CHGM1	Change in months w/Retro pay
CHGM2	Change in months w/Redistribut
CHGM3	Change in months w/Retro&Redis
CONC	Banner Conversion Correction
CONN	Contract End (EPA)
CONV	Banner Conversion from HRS sys
CPAE	Career Progression Adj- Equity
CPAE1	CPA-Equity w/Retro pay
CPAE2	CPA-Equity w/Redistribution
CPAE3	CPA-Equity w/Retro&Redist
CPAEN	DO NOT USE CPA End (SPA)
CPAL	DO NOT USE CPA Begin (SPA)
CPAL1	DO NOT USE CPA Begin Ret (SPA)
CPAL2	DO NOT USE CPA Begin Rdt (SPA)
CPAL3	DO NOT USE CPA Begin R R (SPA)
CPAM	Career Prog Adj - Labor Market
CPAM1	CPA-Labor Market w/Retro pay
CPAM2	CPA-Labor Market w/Redistribut
CPAM3	CPA-Labor Market w/Retro&Redis
CPAR	Career Prog Adj - Retention
CPAR1	CPA-Retention w/Retro pay
CPAR2	CPA-Retention w/Redistribution

CPAR3	CPA-Retention w/Retro&Redistri
DECD	Deceased
DISL	Disability Long
DISS	Disability Short
DUAB	Dual Employmnt Assmt Begin
DUAN	Dual Employmnt Assmt End
ECLAS	Employee Class Change
EPASP	EPA to SPA
EXIGF	Exigency Financial (EPA)
FLSAC	SPA FLSA Status Change
FMLB	FMLA Begin
FMLN	FMLA End
FTE1	DO NOT USE FTE Change Ret
FTE2	DO NOT USE FTE Change Rdt
FTE3	DO NOT USE FTE Change R R
FTEC	FTE Change
FTEC1	FTE Change w/Retro pay
FTEC2	FTE Change w/Redistribu
FTEC3	FTE Change w/Retro&Re
HORT	Horizontal/Lateral Transfer
HORT1	Horizontal/Lateral Tsf w/Retro
HORT2	Horizontal/Lateral Tsf w/Redis
HORT3	Horizontal/Lat Tsf w/Retro&Red
HOUBG	Housing Allowance Begin (EPA)
HOUN	Housing Allowance End (EPA)
INTB	Interim Assn Begin (EPA)
INTB1	Interim Assn Begin Ret (EPA)
INTB2	Interim Assn Begin Rdt (EPA)
INTB3	Interim Assn Begin R R (EPA)
INTN	Interim Assn End (EPA)
JBFN	Funding on Job Ends (EPA)
JBIC	Job Installmnt Change (EPA)
LABO1	Labor Change w/Retro pay
LABO2	Labor Change w/Redistribution
LABO3	Labor Change w/Retro&Redistrib
LABOR	Labor Change Going Forward
LEOR	LEO Retirement Supplement
LISI	Legislative Salary Inc Begin
LISI1	Legislative Salary Inc w/Retro
LISI2	Legislative Salary Inc w/Redis
LISI3	Legislative Salary w/Ret&Redis
LWOB	Leave Without Pay Begin
LWON	Leave Without Pay End
MILDF	Military Differential Payment

MILLR	Return from Military Leave
MILLV	Military Leave
NEWH1	New Hire w/Retro pay
NEWHI	New Hire
OCAB	Off Campus Assn Begin (EPA)
OCAB1	Off Camp Assn Begin Ret (EPA)
OCAB2	Off Camp Assn Begin Rdt (EPA)
OCAB3	Off Camp Assn Begin R R (EPA)
OCAN	Off Campus Assn End (EPA)
ORGC	Organizational Change
PAYOU	Payout
POSC	Position Change (EPA)
PRHRL	DO NOT USE: Hrly Leave Calend
PRMO1	Promotion Begin w/Retro pay
PRMO2	Promotion Begin w/Redistributi
PRMO3	Promotion Begin w/Retro&Redist
PRMOB	Promotion Begin
PRMON	Promotion End
PROI	Prom Inc Aft Eff Date (SPA)
RATE	Hourly Rate Change Forward
RATE1	Hourly Rate w/Retro pay
RATE2	Hourly Rate w/Redistribution
RATE3	Hourly Rate w/Retro & Redistri
REAB	Reappointment Begin
REAB1	Reappointment w/Retro pay
REAB2	Reappointment w/Redistribution
REAB3	Reappointment w/Retro & Redist
REAEN	Reappointment End
REAMT	Reassignment (SPA)
REAU	Reclassification (SPA)
REAU1	Reclassification w/Retro pay
REAU2	Reclassification w/Redistribut
REAU3	Reclassification w/Retro&Redis
REIN	Reinstatement (SPA)
REIN1	Reinstatement w/Retro pay
RESB	Research Assn Begin (EPA)
RESB1	Research Assn w/Retro pay
RESB2	Research Assn w/Redistribution
RESB3	Research Assn w/Retro&Redist
RESRT	Research Assn Return
RETMT	Retirement
RETPB	Retirement Phased Begin (EPA)
RETPN	Retirement Phased End (EPA)
RSGN	Resignation (EPA)

RTCH	Return to FT Teaching (EPA)
RTRN	Return to Reg Assgn (EPA)
SACR	Salary Correction
SALC	Salary Change
SALC1	Salary Change w/Retro pay
SALC3	Salary Change w/Retro & Redist
SALC5	Salary Decrease-Retroactive
SALPL	Salary Planner
SASG	Special Assignment (EPA)
SEAB	Seasonal Add Pay Begin
SEAND	Seasonal Add Pay End
SEPAR	Separated - Voluntary
SEPAT	Separated - Involuntary
SEVBG	Severance Pay Begin
SEVND	Severance Pay End
SGRP	Salary Group Change
SPAEP	SPA to EPA
SXLB	Fac 60 Day Leave Begin (EPA)
SXLN	Faculty 60 Day Leave End (EPA)
TENAW	Tenure Awarded (EPA)
TORG	Timesheet Org Change
TTCS	Title/Salary Change (EPA/GRAD)
TTLC	Title Change Only
W2ADJ	W2 Adjustment
WCOMN	Workers Compensation End
WCOMP	Workers Compensation Begin

### Selecting Job Change Reasons Ending in a Number

#### **Codes Ending with the Number "1":**

Job change reasons ending with the number "1" indicate the Payroll Department is responsible for calculating retroactive pay only for the employee. This action will be calculated using the Personnel Date of Action.

#### **Codes Ending with the Number "2"**

Job change reasons ending with the number "2" indicate to the Payroll Department that a reallocation is required for funding only. This action will be calculated using the Personnel Date of Action.

*Codes ending with "2" cue the payroll department to prepare redistribution forms. If temporary change is needed retroactively for the prior month, but not going forward, the department needs to complete and submit a Payroll Labor Redistribution form.*

*Letter regarding payroll redistributions: If the redistribution is past the thirty day period, accompanying this form should be a letter from the department head/department chair formally requesting the Payroll Department to redistribute the funds with an explanation as to the cause for the late funding change as well as the period the funds will have to be redistributed. **Associated benefit charges do not need to be entered on the BHR-Payroll Labor Redistribution Form. The benefit charges will be calculated and redistributed by the BannerHR System based on the new labor distribution.***

### **Codes Ending with the Number "3"**

Job change reasons ending with the number "3" indicate to the Payroll Department that a reallocation is required as well as retroactive pay. This information indicates the action was retroactive for both reallocation and retroactive pay. This action will be calculated using the Personnel Date of Action.

*Codes ending with "3" cue the payroll department to prepare redistribution forms and calculate retroactive pay. If temporary change is needed retroactively for the prior month, but not going forward, the department needs to complete and submit a Payroll Labor Redistribution form.*

*Letter regarding payroll redistributions: If the redistribution is past the thirty day period, accompanying this form should be a letter from the department head/department chair formally requesting the Payroll Department to redistribute the funds with an explanation as to the cause for the late funding change as well as the period the funds will have to be redistributed. **Associated benefit charges do not need to be entered on the BHR-Payroll Labor Redistribution Form. The benefit charges will be calculated and redistributed by the BannerHR System based on the new labor distribution.***

### **Codes Ending with the Number "4" (Only LISI4)**

Job change reason ending with the number "4" indicates to the Payroll Department there has been a revised Legislative Increase Salary amount. This is ONLY to be used for revised Legislative Increases. The revision may require a reduction or increase in the new Annual Salary. The revision will be calculated using the Personnel Date of Action.

### **Codes Ending with the Number "5" (Only SALC5)**

Job change reason ending with the number "5" indicates to the Payroll Department there has been a decrease in the Annual Salary dating back to a prior period. This decrease will be calculated using the Personnel Date of Action.

## **APPENDIX B: Changes and Corrections to Payroll Labor Charges**

### **Policy**

The current policy at UNCG, which requires a position to be established, classified/designated and sufficiently funded prior to employing an individual for the position, is fundamentally sound. An employment personnel action form, approved electronic action form or manual form, that reflects the

funding source for the job assignment, is required to be prepared in advance and approved by the appropriate Provost/Vice Chancellor, the Office of Financial Planning and Budgets, Contracts & Grants (if necessary) and the appropriate personnel office (Office of the Provost or Office of Human Resources). The fund and account number(s)/funding source must be reflected on each employment personnel action form.

Payroll redistributions caused by funding changes should be rare and, generally, should only occur due to actions by some external agency (e.g., the federal government, the North Carolina legislature, the UNC Board of Governors). However, there will be instances where changes are necessary due to personnel actions initiated by internal management.

### **External Agency Imposed Changes in Funding**

(e.g. Federal Government, North Carolina Legislature, UNC Board of Governors) Appropriate personnel action forms must be prepared, submitted and approved in advance of the effective date for changes in funding made or imposed by external agencies.

In the event that an external agency makes funding changes retroactively, appropriate personnel action forms must be prepared, submitted and approved on or before the established payroll due date for the next monthly payroll.

The BannerHR job personnel date (date the change should have occurred) of the changes in funding must be reflected on the personnel forms so that retroactive adjustments in the distribution of prior months' labor and benefit charges (also referred to as redistributions) may be made by the Payroll Office personnel.

Redistributions will be permitted beginning with the personnel date of the funding change and the date of notification from the external agency.

The Department Head and Principal Investigator must make corrections and submit revised Time and Effort reports to the Office of Contracts and Grants for all periods affected by the retroactive changes.

### **Internally Mandated Changes in Funding and/or Positions**

Appropriate personnel action forms must be prepared, submitted and approved in advance of the effective date for changes in funding and/or positions that are made or imposed by internal management.

In the event that internal management makes funding/position changes retroactively within the thirty day period, appropriate personnel action forms must be prepared, submitted and approved on or before the established payroll due date for the next monthly payroll.

The BannerHR job personnel date (date the change should have occurred) of the changes in funding and/or positions must be reflected on the personnel action forms so that retroactive adjustments in the distribution of prior months' labor and benefit charges (also referred to as redistributions) may be made by the Payroll Office personnel.

Redistributions normally should not be submitted for any prior period of more than thirty days. In the event of extraordinary circumstances that the redistribution is needed for more than the prior thirty day period, a written explanation should accompany the personnel action form to provide an appropriate explanation. This explanation should be sufficient to pass the external audit test, as to why the change in labor distribution is being made and to also show that the department is not being negligent. (Paying for labor charges from the wrong fund source could result in audit findings, especially if it is repetitive. Therefore, it is important for the department head to take the responsibility for submitting the correct



paperwork in the first place and by the deadlines.) This letter should be directed to the Assistant Controller.

The Department Head and Principal Investigator must make corrections and submit revised Time and Effort reports to the Office of Contracts and Grants for all periods affected by the retroactive changes.

## Assumption of Risk Policy

Occasionally formal notice of a new award or continued award can be delayed. In some cases when the probability of funding is clearly established, it is in the best interests of the investigators and UNCG to either initiate or continue the work before the formal notice arrives. To accomplish this, one can request that the Associate Provost for Research assume the risk for the funding. ([Assumption of Risk Policy](#))

This Assumption of Risk Policy defines the general parameters through which a PI, Department, Unit or the Associate Provost for Research and Public/Private Sector Partnerships (APRPPSP) might assume financial risks associated with sponsored research or projects prior to the receipt of a formal award or fully executed agreement or prior to the receipt of continuation support for multi-year projects; sets forth the necessary administrative review process and designates who, within the University, authorizes an assumption of risk (AOR).

Externally sponsored programs frequently have start dates that precede the finalization or receipt of formal award documents or agreements. When beginning on time is of the essence or when an account number is required to initiate the development of position descriptions and job announcements, the PI can request an AOR. The AOR authorizes the establishment of a restricted funds account from which the PI may make expenditures for 1-3 months.

The AOR can be requested for:

- ✚ Pre-award expenditures
- ✚ New Awards
- ✚ The period between the end date of a current budget period and receipt of the next increment of funds or the formal extension of the end date for multi-year projects. If IRB or IACUC approval is pending, AORs will only be approved for the portion of proposed awards that does not require IRB/IACUC approval.

AOR requests must be reviewed and approved by the Office of Sponsored Programs (OSP), the Office of Contracts and Grants (C&G), and the APRPPSP.

The AOR request package consists of:

- ✚ The AOR request form located at <http://www.uncg.edu/rss/forms/AORPolicy.pdf>
- ✚ An itemized budget for the period requested (1-3 months)
- ✚ Supporting documents/correspondence

The complete AOR request package is submitted to the Office of Sponsored Programs for Administrative Review.

- ✚ Print out the form
- ✚ Include copies of correspondence from sponsor and detailed budget for period of AOR (not to exceed 3 months)
- ✚ Submit form and documentation to OSP
- ✚ OSP reviews, makes recommendation, and submits to C&G
- ✚ C&G reviews, and makes recommendation, and returns to OSP

- ✚ OSP submits AOR to APRPPSP
- ✚ APRPPSP reviews and makes decision to approve or deny
- ✚ Completed form is returned to OSP
- ✚ Copy of AOR decision is sent to PI
- ✚ If approved, the AOR is submitted to Contracts and Grants and a fund number can be assigned. The PI will be notified when this is done.

Voided items are not eligible for redistribution.

## Reporting

Departmental Labor Distribution Reports will be generated from BannerHR and posted on a monthly basis to each Banner Finance fund. The reports can be viewed on Banner Finance ePrint.

The Banner reports will reflect all of the labor and benefit charges that are reflected in summary form on the report. The charges will be reflected in detail by fund, by account, by employee, and by position number.

Each Banner fund holder should utilize the reports to verify the accuracy of salaries and benefits charged to each of his/her Banner fund and account.

## Responsibility for Doing Redistributions

The Payroll Office will be responsible for doing the redistributions prior to the next payroll being run, subject to receipt of appropriate documentation supporting the changes in funding by the established due dates.

## Procedures

Once sufficient funding has been secured and approved for a position, and the employee has been properly paid from the approved funding source, any changes in funding may require the redistribution of prior months' labor and benefit charges.

## Correction of Errors

It is recognized that the growth of the University's employee base, together with the surge in contract/grant activity and acquisition of other external funding, has contributed greatly to the volume of personnel forms prepared and submitted for action. Despite the best efforts of departmental and unit personnel who prepare and process personnel action forms, it is recognized that an error-free environment is unrealistic. These procedures address how errors are to be corrected.

- ✚ Revised personnel action forms (electronic personnel action form, or manual form, as applicable) must be prepared, submitted and approved for corrections to the labor and benefit distribution charges.
- ✚ These forms must be submitted in accordance with established payroll deadlines so that the correction can be made during the next scheduled payroll cycle.
- ✚ If applicable, revised Time and Effort Reports should be submitted to the Office of Contracts and Grants for the affected month.



## Changes to Payroll Labor Charges for Future Month(s) AND Prior Month(s):

If a change to payroll labor funding is necessary for a future employee job assignment as well as prior job assignment of which payment has been made to the employee, the department may be able to complete an EPAF (electronic personnel action form) or a manual personnel action form to generate both actions, for the future and the past. In order for the transaction to be properly handled, there are two key pieces of information that are applicable, in addition to the applicable EPAF or form procedures:

- ✦ the “Personnel Date” must be the date of which the redistribution should begin (i.e. July 1, 2008)
- ✦ the “Change Reason” must be the appropriate change reason code that has “2” in the last position if it involves redistribution, or “3” if it involves retro pay and redistribution.



If an EPAF or manual personnel action form has been completed, approved, and submitted for labor changes for prior periods AND future periods, using the personnel date and the change reason code, the Payroll Department will redistribute labor and benefit charges based on the information.

### Changes and Corrections for Prior Month(s)

If this is a temporary change in funding for prior month(s) only and does not involve current or future changes to labor, the BHR-Payroll Labor Redistribution Form will need to be completed, approved, and submitted to the Payroll Department. The redistribution will be entered by Payroll personnel based upon the BHR-Payroll Labor Redistribution Form submitted by the employing department head/dean, and approved by the appropriate Provost/Vice Chancellor, the Office of Financial Planning and Budgets, Contracts & Grants (if necessary) and the appropriate personnel office.

Disbursement of state and federal funds must be in accordance with applicable laws, rules and regulations. In order to avoid any audit findings related to the misuse of state or federal funding, the BHR-Payroll Labor Redistribution Form must be prepared by the employing department within thirty days of the effective date of the funding notification. If applicable, revised Time and Effort Reports should be submitted to the Office of Contracts and Grants within thirty days of the funding notification. Departments will need to submit a BHR-Payroll Labor Redistribution Form to the Payroll Department in order to secure a temporary redistribution of funds involving a prior period ONLY. This form can be found on the following website: [http://fsv.uncg.edu/payroll/payroll\\_forms.html](http://fsv.uncg.edu/payroll/payroll_forms.html).

If the redistribution is past the thirty day period, accompanying this form should be a letter from the department head/department chair formally requesting the Payroll Department to redistribute the funds with an explanation as to the cause for the late funding change as well as the period the funds will have to be redistributed. **Associated benefit charges do not need to be entered on the BHR-Payroll Labor Redistribution Form. The benefit charges will be calculated and redistributed by the BannerHR System based on the new labor distribution.**

The following is a detailed explanation as to how to complete the BHR-Payroll Labor Redistribution Form.

1. Enter the Banner ID# of the employee for which the redistribution will occur.
2. Enter the unique Position#-Suffix combination that identifies the Job ID for which the redistribution will occur.
3. Enter the Employee Name beginning with Last, First and then Middle Initial.
4. Enter the Effective Begin Date of the labor redistribution.
5. Enter the Effective End Date of the labor redistribution.
6. Under the heading OLD Earnings Labor Distributions, enter the following information based on the pay period in which the employee was paid:

**You will need to enter this information for all FOAPs the employee was paid on this Job (unique Position/Suffix combination)**

**Amount per FOAPAL Index   Fund   Orgn   Account   Program**

**The percent will automatically be calculated on the form.**

7. Under the heading NEW Earnings Labor Distributions, enter the following information based on the pay period in which the redistribution will occur:

**You will need to enter this information for all FOAPs the employee should have been paid on this Job (unique Position/Suffix combination)**

**Amount per FOAPAL Index   Fund   Orgn   Account   Program**

**The percent will automatically be calculated on the form.**

8. All required signatures must be on the form when the form reaches the Payroll Department. If all signatures are not on the form, the form will be returned to the submitting department.

## APPENDIX C: EMPLOYEE CLASS CODES

The Employee Class Code in Banner is found on the PEAEMPL form. It determines what benefits and deductions an employee is eligible to receive. It is also used for reporting on different employee populations. For example, employees who are SPA, EPA, Non-faculty EPA, Part-time, Full-time, Temporary, Student, etc. can be identified using the Employee Class. Leave Category, Benefit Category and Part/Full-time Status will default into the PEAEMPL form based on the Employee Class chosen.

AA	Affiliated Persons	GF	Graduate flat-pay
AF	Adjunct (Faculty)	GH	Graduate hourly
AJ	Adjunct (EPA)	L1	Librarians 12 month, leave earning
AR	Affiliated Research Part Non Paid	PH	Pre-Hire Student/Graduate Assistant
E1	SAAO I 12 Month, leave earning	RE	Retired (EPA) working
E2	SAAO II 12 Month, leave earning	RF	Retired (Faculty) working
EA	EPA 10 month, leave earning	RH	Retired Historical
EB	EPA 11 month, leave earning	RW	Retired (SPA) Working (Hourly)
EC	EPA Permanent part-time	SA	SPA 10 month, leave earning
ED	EPA 9 month, leave earning	SB	SPA 11 month, leave earning
EN	EPA 9 month non-leave earning	SC	SPA 9 month, leave earning
EP	EPA 12 month, leave earning	SD	SPA Seasonal Part-Time
ER	EPA phased retirees	SE	SPA Exempt
ET	Temporary EPA (not faculty)	SF	SPA Temporary Flat-pay
FA	Temporary Academic yr. faculty	SN	SPA Non-exempt
FC	Faculty 9 month, non-leave earning	SP	SPA Permanent part-time
FE	Faculty 10 month, non-leave earning	SS	Summer Session Employee
FF	Faculty 11 month leave earning	ST	SPA Temporary Hourly
FG	Faculty 12 month, leave earning	UF	Undergraduate Flat-pay
FO	Other temporary faculty	UH	Undergraduate/Graduate Hourly,
FP	Faculty permanent part-time	WG	Graduate Work Study Students
FS	Temporary semester faculty	WS	Work Study Students

## APPENDIX D: HOURS WORKED PER WEEK AND FTE CONVERSION CHART FOR TEMPORARU EMPLOYMENT ECLASSES

**Hours Per Week FTE Conversion Chart:** This chart allows the department to identify the associated FTE to the identified maximum number of hours worked per week for non-permanent employees, excluding teaching faculty. <http://web.uncg.edu/hrs/benefits/aca/Tools/HoursWorkedPerWeekFTEConversionChart2014.pdf>

Hours Worked Per Week	Corresponding FTE	
40	1.000	
39	0.975	
38	0.950	
		HEALTHCARE
		ACA ELIGIBLE
37	0.925	
36	0.900	
35	0.875	
34	0.850	
33	0.825	
32	0.800	
31	0.775	
30	0.750	
29	0.725	
28	0.700	
27	0.675	
26	0.650	
25	0.625	
24	0.600	
23	0.575	
22	0.550	
21	0.525	
20	0.500	
19	0.475	
18	0.450	
17	0.425	
16	0.400	
15	0.375	
14	0.350	
13	0.325	
12	0.300	
11	0.275	
10	0.250	
9	0.225	
8	0.200	
7	0.175	
6	0.150	

5	0.125	
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## APPENDIX E: FACULTY FTE CALCULATION CHART

**Faculty FTE Conversion Chart:** This chart provides the reasonable standard of calculating faculty work hours that will be applied by the University of North Carolina. It demonstrates that temporary faculty should ordinarily be credited with three hours of work per week for each credit hour assigned to a semester-long course and how these work hours translate into corresponding FTEs. [provost.uncg.edu/Academic/EPA\\_Personnel/forms](http://provost.uncg.edu/Academic/EPA_Personnel/forms)

Credit Hours Taught	Hours/Work Effort Equivalent	Corresponding FTE	% of Full Time	
1	3	0.075	7.50%	<b>NOT ACA Healthcare Eligible</b>
2	6	0.150	15%	
3	9	0.225	22.50%	
4	12	0.300	30%	
5	15	0.375	37.50%	
6	18	0.450	45%	
7	21	0.525	52.50%	
8	24	0.600	60%	
9	27	0.675	67.50%	
10	30	0.750	75%	<b>ACA Healthcare Eligible</b>
11	33	0.825	82.50%	
12	36	0.900	90%	
13	39	0.975	97.50%	
>13	40	1.000	100%	