ELECTRONIC PERSONNEL ACTION FORM (EPAF)

Faculty EPAF Process

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Sarah Ekis, Human Resources
Agenda

• Why is this training important?
• Learning objectives
• What is an EPAF?
• Who creates an EPAF?
• Why should an EPAF be submitted?
• How & when is an EPAF completed?
• Practice!
WHY IS THIS TRAINING IMPORTANT?
Priority to pay people appropriately

- 2,700 EPAFs/$16.4M in FY17 (Academic Affairs)
- 4,000 EPAFs/$22.3M in FY18
- Each EPAF action has a minimum of:
  - 1 originator + 1 departmental approver +1 AA/HR approver + 1 Fund approver = …
  - **4 people** with responsibility for a single action
  - Multiply those “touches” by the number of times the EPAF gets returned

- All that work adds up **FAST**...and returns create churn for us all
Learning Objectives

• At the end of this training you will:
  • Collect and prepare EPAF details early
  • Review details for accuracy, completeness, and compliance using critical thinking
  • More efficiently navigate EPAF elements
  • Use appropriate routing queues for varied actions
  • Minimize the number of errors and “return churn”
  • Know and contact the appropriate subject matter expert, beginning with your Business Officer
WHAT IS AN EPAF?
What is an EPAF?

• **Electronic Personnel Action Form**
• Streamlined method for submitting personnel actions electronically
• EPAFs replaced the paper-based PD-7 for *temporary pay* actions
  • Part Time Faculty Hires
  • Special Payments (EHRA Staff or Faculty)
Why use an EPAF?  
**Efficiency, Transparency**

- Data entry in your control: second-level data entry not needed & error-risk reduced
- Routed electronically: no “lost” paperwork or “looking” for your forms
- Transparent workflow: see approver-level status
- Reduced time getting actions approved between levels and routed into Banner
Why use an EPAF? *Temporary Pay to EHRA faculty or EHRA staff*

- Hiring adjunct / part-time faculty as *temporary* employees
- Full-time EHRA faculty or EHRA staff performing duties outside their normal position duties and/or department—
  - One-time special payment; a temporary pay, never added to permanent base salary
- EHRA staff teaching a course for credit
EPAFs Allow Users To:

Enter personnel payment actions to upload into Banner
Automatically routes actions for approval
Track actions as they flow through the process
Disapprove or return personnel actions that need corrections
View a one year history of all personnel actions
EPAF BASICS
EPAF Roles

**Originator**
- The person who creates the EPAF

**Approver**
- Reviews and Approves (or disapprove) EPAF
- Can return to the Originator for correction or forward to next Approver

**Proxy**
- Someone who has been delegated proxy access by an approver and has the same authority as the approver in making decisions on personnel transactions

**FYI (For Your Information)**
- Only views the details of an EPAF

**Applier**
- An HR user who applies the EPAF data to Banner
- Final Step in EPAF process
Originator Responsibilities

• Gather all information needed to create an EPAF
  • Seek further details/rationale, if needed
  • Communicate delays or changes directly to requestor
• Ensure detail/action is allowable (compliance)
• Identify approvers in the routing queue for your department or area
• Determine if other approvers outside of the mandatory routing queue need to be added
  • Add “Grants & Contracts Administration” approver to grant-funded actions
• Monitor approval status to prevent delays
**Approver Responsibilities**

- Review all information in an EPAF for accuracy.
- Approve, disapprove or return an EPAF for correction.
- Contact the Initiator of the EPAFs you are not approving to explain your action.
- Approve your EPAFs in a timely manner.
- Set up Proxy Approver access as soon as possible.
EPAF Approver Buttons

- “Approve”
  - Forwards the EPAF to the next level and attaches your “signature” electronically

- “Disapprove”
  - Cancels the EPAF transaction and removes it from the approval routing queue

- “Return For Correction”
  - Sends an EPAF back to the Originator to be corrected and removes it from the approval routing queue
Proxy Approver

- An approver who is given access to approve EPAFs for someone else
- A proxy has the same level of authority in approving personnel transactions as the approver who delegated the proxy access.
- Proxies are only set up for Approvers, not for Originators.
The Proxy Process?

- Approvers set their proxies by using the “EPAF Proxy Records” link on the main menu.
- Proxy approvers use the “Act as a Proxy” link on the menu to take action on an EPAF.
- The name of the proxy approver, date and time are displayed in the EPAF Summary section, when a proxy approves an EPAF.
What Cannot Be Done on EPAFs?

- You cannot update employee positions.
- You cannot change a job assignment.
- Changes are still processed on a superseding PD-7.
- You must continue to use the PD-7 for actions not available on EPAFs.
How to Get EPAF Access

• A business manager or supervisor must fill out the EPAF request form:  https://hr.uncc.edu/webform/epaf-access
LOGGING IN
How do I login?

Log in to my.uncc.edu using your NinerNet ID and password.
How do I login? cont.

Select ePAF (Electronic Personnel Action)
EPAF Menu

**Approver Summary:** View EPAFs needing your approval

**Originator Summary:** View all EPAFs you have originated

**New EPAF:** Create a new EPAF

**EPAF Proxy Records:** Designate a proxy or view users who are listed as your proxy

**Act as a Proxy:** Log in as a proxy to approve an EPAF
Originator & Approver Summary

**Originator Summary**

**Current** tab: EPAFs you need to correct (Originator) or approve (Approver). Similar to an “inbox”

**History** tab: EPAFs that have been completed.

**Approver Summary**

**In My Queue**: EPAFs that you will need to approve, but are not to that point yet.
### Originator & Approver Summary

#### Type of EPAF and Transaction Number
- **Name**: EPA Staff Perm Special Payment, ESPE45-01
- **Transaction ID**: 133254
- **Type of Change**: Special Payment for Full Time Employee
- **Submitted Date**: Oct 19, 2017
- **Effective Date**: Jan 01, 2018
- **Required Action**: Approve

#### EPAF Status

#### View Comments

The Effective date: the 1\textsuperscript{st} day of the payroll cycle the employee will be paid

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Transaction</th>
<th>Type of Change</th>
<th>Submitted Date</th>
<th>Effective Date</th>
<th>Required Action</th>
<th>Action</th>
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<td>Special Payment for Full Time Employee</td>
<td>Oct 19, 2017</td>
<td>Jan 01, 2018</td>
<td>Approve</td>
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<td></td>
<td><strong>Comments</strong></td>
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</table>
## Transaction Status in the Summary

<table>
<thead>
<tr>
<th>Transaction Status</th>
<th>Definition. <em>The EPAF has been or is:</em></th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>Approved by all approvers in the routing queue, but has not been applied to Banner by Human Resources; it will not trigger pay, yet.</td>
</tr>
<tr>
<td>Complete</td>
<td><strong>Applied to Banner by Human Resources and will be paid.</strong></td>
</tr>
<tr>
<td>Disapproved</td>
<td>Disapproved by an approver in the routing queue.</td>
</tr>
<tr>
<td>Pending</td>
<td>Waiting for the next approver in the queue to take action.</td>
</tr>
<tr>
<td>Return for Correction</td>
<td>Returned to the originator for correction by an approver in the routing queue.</td>
</tr>
<tr>
<td>Void</td>
<td>Voided by the originator.</td>
</tr>
<tr>
<td>Waiting</td>
<td>Not submitted yet and is in the process of being created. Another person cannot access the record.</td>
</tr>
</tbody>
</table>
HOW TO CREATE AN EPAF
EPAF Categories

- **Hire Part Time Faculty, E50PTF**
  - Used to hire Adjunct / Part-time Faculty

- **Special Payment for Full Time Employee, E45SP**
  - Use if a full-time employee member is getting additional compensation
Before entering an EPAF think about this!

What is today’s date?
- EPAF deadlines are:
  - 1st day of month to be paid in the 15th payroll
  - 16th of the month to be paid in the End of the Month payroll

Payroll deadlines
- Is this EPAF going to get approved before the payroll deadline?

Is the employee full time or part time?
- Full time faculty receive special payments. Part time don’t.

Is an Approver out of the office?
- If the approver is out of the office the EPAF may not be approved in time
Compliance Considerations:

Questions to ask yourself

• Is this faculty member 9 mos or 12 mos?
  • There are very few situations where 12 mos can receive special pay.

• Am I paying someone who is EHRA Staff?
  • Have you checked with Sarah Ekis to make sure they can be paid a special pay for this work?
  • Do you have documentation confirming supervisor approval?
    • Supervisor statement confirms there is no “standard work day” time conflict; if the special pay job occurs during the work day, then supervisor describes when/how the staff member will complete regular duties.
    • Supervisor approval signals there is no perceived conflict of effort, either. This means the special pay job will not interfere with the overall productivity of the staff member.

• Am I paying someone outside of my college/unit?
  • Have you reached out to ensure you can pay that person for the work?

PLEASE MAKE SURE YOU KNOW YOU CAN PAY SOMEONE BEFORE THEY START THE WORK.
Compliance Considerations:
Questions to ask yourself

• Have I checked to make sure that you are using a unique suffix?
  • Check “all jobs” and check NBAJOBS in Banner

• Is all of the information an approver needs to review for this action entered on the EPAF form?
  • Title describes work being done for extra pay; is not the full-time title
  • Comments include a detailed explanation of when the work is being done, what the work is, and how/why the work is not a part of standard duties for the person being paid
  • Query and personnel dates match the description of work dates (see Camtasia video on AABP website, the “matching principle”)

• Who “owns” the position and who is the fund owner that is responsible for this pay?
  • If those are two different people, then you will need two different departmental approvers. Add “Grants & Contracts”, as needed.
Compliance Considerations:
Questions to ask yourself

• **When is the work being done?**
  • If summer, consider the “faculty 3/9ths rule” and make sure your area is aware of *all, cumulative*, pays the faculty member is receiving
    • Make sure you have query dates for the summer session, and not after!
  • Do your personnel dates and query dates reflect when the work is being done?
    • We cannot pre-pay anyone for work
    • We cannot wait to pay as “after-the-fact”, meaning, a long time after work has been completed. Pay requested for work completed 3 months earlier will not be approved because it is a compliance concern.

• **Am I aware of the current UNC System Office (SO) Guidelines and their potential impact on this special pay?**
  • See AABP website: [https://provost.uncc.edu/academic-budget-personnel/useful-links](https://provost.uncc.edu/academic-budget-personnel/useful-links)
  • Discuss $/% calculations with your Business Officer to ensure the payment is allowed.
Compliance Considerations:
Questions to ask yourself

• Is this a brand new instance of work for this employee?
  • If this pay is for the continuation of work, then complete a PD-7 to change the length of the assignment rather than a new EPAF
    • Example: 9 mos stipend with continuation of work done in the summer.

• Is this person being paid on a grant fund?
  • Please ensure grants and contracts has been involved in the vetting of this payment.
  • Just because AA approves, does not mean that this payment will ultimately be approved by GCA who manages grant-specific compliance details.

• Have you entered this payment with enough time for it to reasonably get through the approval queue?
  • Please email your departmental approvers to let them know when you have entered an EPAF for their approval.
  • AA’s ability to meet approval deadlines is based on when the EPAF hits the AA approval queue, NOT WHEN THE EPAF IS ENTERED INTO THE SYSTEM.
How Do I Begin an EPAF?

1. Click **New EPAF** in the EPAF menu.

2. Enter UNCC ID.

3. Query Date must be the 1\(^{st}\) or the 16\(^{th}\).

4. Choose Approval Category

5. Once Approval Category is chosen, all active jobs will appear.
Query Date & Approval Category

• **Query Date** – The first day of the pay period the employee will be paid.
  • Pay date = 15\textsuperscript{th} of month $\rightarrow$ Query date = 1\textsuperscript{st} day of month
  • Pay date = last day of month $\rightarrow$ Query date = 16\textsuperscript{th} of month

• **Approval Category** – The type of EPAF you would like to complete.
Completing an EPAF

• Click Active Jobs to see the employee’s current jobs.
• Enter the position number and the two digit suffix, then Tab.
  • Remember you can’t use the same position number and suffix combination more than once.
• Click Go to continue.

Job Status will tell you if they have a current job.

Enter Position Number & Suffix

Click Go to continue
The top portion of the EPAF provides information entered on the previous screen.
EPAF Sections – Create & End Assignment

- The “Create Assignment” and “Assignment End Date” sets up and terminates the job record on NBAJOBS in Banner
Create Assignment, ESPE45-11 EPA Staff Perm Special Payment

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<tr>
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These should be the same as the Query Date.

Assignment End Date, ESPE45-11 EPA Staff Perm Special Payment

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Create Assignment, ESPE45-11 EPA Staff Perm Special Payment

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This is the date work begins.

Does this match the comment?

Do the Personnel Dates make sense for the Salary amount?

Is the salary amount appropriate for that length of time?
Does the salary make sense for the Personnel Dates?

Needs to be comparable to an internal benchmark that shows a similar level of pay for similar work.

If no internal benchmark, use the faculty member’s hourly/weekly rate from their base salary to calculate.
Is this the org that the position sits on? Who “owns” the position?

Look at “Payroll Default” tab on NBAJOBS screen to confirm.
Tips & Guidance: Salary for Special Pay

**Internal Benchmark**

- Provide a reference for how pay was determined.
- Is this something that has set rates of pay within your college?
- Assistance?: Department Chair or College Business Officer

**No Internal Benchmark**

9-month salary = $90,000

Weekly salary = $2,500 (36 weeks)

Hourly rate = $62.50 (40 hours per wk.)

So special pay cannot exceed $62.50 per hour or $2,500 per week.
Tips & Guidance: Salary for Special Pay
Create Assignment, ESPE45-11 EPA Staff Perm Special Payment

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<tr>
<td>FTE: *</td>
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</tbody>
</table>

Are these the correct number of pay periods for the Job Effective Dates?

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</tr>
</tbody>
</table>
Is this either the 15th or the last day of a month?
Tips & Practice: Factors & Pays

- To compute factors & pays, consider how many pay periods will happen between the query dates you have listed.

- We have two pay periods a month, on the 15th and the end of the month.

- If you get them wrong, the system could end up paying the incorrect amount to the employee.

How many factors & pays?

- You enter a special pay with a query date of August 1st and a job effective date of May 15th.
  - Answer: 19 pay factors

- You enter a special pay with a query date of October 1st and a job effective date of December 31st.
  - Answer: 6 pay factors
Create Assignment, ESPE45-11 EPA Staff Perm Special Payment

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</table>

This is the date work ends.

Does it match the comment?

Do the Personnel Dates make sense for the Salary amount?
The “Funding Source” populates NBAJOBS in Banner.
If split funding enter each funding source on separate lines.
Click Default from Index once the Index has been entered.

Errors and Warning Messages
Type Message Type Description
Funding Source ERROR Account code is required.
* - indicates a required field.

Click Default from Index to change the values in the Fund and Organization columns

Should always equal 100
Funding Source, Routing Queue, & Comment

<table>
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<th>Fund</th>
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<th>Account</th>
<th>Program</th>
<th>Activity</th>
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<th>Project</th>
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Is this number either 911300 (non-teaching) or 913300 (teaching an accredited course)?
EPAF Sections – Routing Queue

If you set up your Default Routing Queue the routing section will be complete.

- The Routing Queue determines the approval workflow.
- Click **Save and Add New Rows** once the approvers have been entered.
EHRA Non-Faculty

What is it for?

Teaching
- Tonya McMannen
- Sarah Ekis

Non-Teaching
- Contact Sarah Ekis before submitting an EPAF

SHRA
- Contact Tracy Worthey
Routing Queue Cont’d

Add Staff Employment: Tracy Worthey

Is this SHRA teaching an accredited course?
Routing Queue Cont’d

### New
**Effective Date:** 11/16/2017

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**Total:** 100.00

- Default from Index
- Save and Add New Rows

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Routing Queue

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<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
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<tbody>
<tr>
<td>1 - (PAYROL) Payroll</td>
<td>KSAM</td>
<td>FYI</td>
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<tr>
<td>45 - (DEPT) Department</td>
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<td>Approve</td>
</tr>
<tr>
<td>60 - (AA) Academic Affairs</td>
<td>TMCMANNE</td>
<td>Approve</td>
</tr>
<tr>
<td>65 - (FUND) Fund Approval</td>
<td>Tonya J McMannen</td>
<td>Approve</td>
</tr>
<tr>
<td>90 - (HR) Human Resources</td>
<td>BAN</td>
<td>Apply</td>
</tr>
</tbody>
</table>

**Comment**

- Is this EHRA staff teaching an accredited course?
- Add Sarah Ekis as another AA Approver
EPAF Sections - Comments

- Comments are always needed and are used to enter additional information and provide explanations for actions concerning the EPAF.
- Comments can be added at any time as the EPAF moves through the workflow.
- Click **Save** once the comments have been entered. Then **Submit** to route the EPAF for approval.
Does this include a detailed description of the work performed?

If SHRA, EHRA staff, or 12-Month Faculty, is Justification comment added?
Submitting the EPAF

• Once the originator clicks Submit the EPAF has moved to the first Approver for Approval.
• If the EPAF is submitted successfully you will receive:
  • A confirmation message at the top of the screen
  • A “Transaction” number
  • “Transaction Status” will change to Pending.
Submitting the EPAF

• If there are any data validity issues within the EPAF, Banner will display two types of messages:
  • **ERROR** - Error messages will not allow the EPAF to progress to the approval levels. Errors must be corrected. Read the details provided, and correct the errors as indicated.
  • **WARNING** - Warning messages simply deliver information, and allow the EPAF to progress successfully.
What if I need help?

• Training Manuals for EPAFs:
    • EPAF General Instructions
    • Hire Adjunct / Part-time Faculty
    • Special Payments for Full Time Faculty & EHRA Staff
    • Hire Temporary EHRA Staff
  • Academic Budget & Personnel Website: [http://provost.uncc.edu/academic-budget-personnel/training](http://provost.uncc.edu/academic-budget-personnel/training)
    • Today’s presentation
    • EPAF Cheat sheet
    • Camtasia video
• College and Unit Internal EPAF experts
Let’s consider some scenarios…

• **How would you complete EPAFs for your assigned scenario and what are the special considerations for that scenario?**

• **Scenario #1:** You have an EHRA Staff member who you would like to pay to teach a class in the Fall Semester.

• **Scenario #2:** You have a faculty member who needs to be paid partial summer salary for some work on a grant completed between May 16th and June 30th.

• **Scenario #3:** You have a faculty member that has earned a college level award. You would like it to be paid in the March 31st payroll.

• **Scenario #4:** You have a faculty member from another college who is completing a project for your department. Work will be done between July 1st and September 30th.
QUESTIONS OR COMMENTS?
## Important EPAF Contacts

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Franci Hamilton</td>
<td>University Program Specialist, PT Faculty Hiring (AA)</td>
<td><a href="mailto:frhamilt@uncc.edu">frhamilt@uncc.edu</a></td>
<td>7-5776</td>
</tr>
<tr>
<td>Tracy Worthey</td>
<td>Staff Employment (HR)</td>
<td><a href="mailto:taworthe@uncc.edu">taworthe@uncc.edu</a></td>
<td>7-0670</td>
</tr>
<tr>
<td>Sarah Ekis</td>
<td>Human Resources Consultant, EHRA NF Administration</td>
<td><a href="mailto:sekis@uncc.edu">sekis@uncc.edu</a></td>
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<tr>
<td>Tonya McMannen</td>
<td>Budget Manager (AA)</td>
<td><a href="mailto:tmcmanne@uncc.edu">tmcmanne@uncc.edu</a></td>
<td>7-5772</td>
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<tr>
<td>Elizabeth Moll</td>
<td>Business Officer (AA)</td>
<td><a href="mailto:Elizabeth.Moll@uncc.edu">Elizabeth.Moll@uncc.edu</a></td>
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THANK YOU!