MANAGERS’ & ADMINISTRATORS’ GUIDE
TO BANNER HUMAN RESOURCES
Electronic Personnel Action Forms (EPAFS)
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Chapter 1: Electronic Personnel Action Forms (EPAFS)

What is an Electronic Personnel Action Form (EPAF)?

The EPAF is an electronic form available to managers and administrators to initiate personnel transactions.

When to use an EPAF?

1. **Termination of Job**
   Submit a ‘Termination of Job’ EPAF when an employee is leaving a job that s/he holds in your department.

2. **Transfer**
   Submit a ‘Transfer’ EPAF when an employee is leaving the job that s/he holds in your department to assume another job within the College, or your department. 
   *Note: The Effective/Personnel Date should reflect the last day the employee worked in the position.*
   *Note: This EPAF should not be used for transfers between College Work Study and Interim positions if the Work Study will be returning to the Work Study account after a period of time. Use the Work Study Transfer to Interim EPAF for these types of transfers.*

3. **Semester Based Reappointments – Graduate Assistant, Course Assistant, Part-Time Instructional Appointments and Community Teachers for all academic terms**
   Submit a reappointment EPAF when an employee who is returning to the same appointment in the following classifications in the same academic department:
   - Part Time Instructional (Fee Based Instructor/Part-Time Instructor/Adjunct Professor)
   - Graduate Assistant
   - Course Assistant
   - Community Teachers
   *Note: These EPAF(s) can only be used for appointments where index numbers do not change from the previous appointment and the appointment is a regular term appointment.*

4. **Rehire EPAF for College Work Study Employees**
   Submit a ‘Rehire’ EPAF when a College Work Study is being rehired/reappointed onto a previously terminated Work Study position.

5. **College Work Study Transfer to Interim**
   Submit a ‘Transfer to Interim’ EPAF when a College Work Study employee has used up their Work Study funds and needs to be paid on the interim account line.

6. **Updating an EPAF**
   Update a transaction that has been ‘Returned for Correction.’
Chapter 2: Step-by-Step Directions on EPAFs

Step 1: New EPAF – Person Selection page

1. Access the MyTC Portal with the following URL: https://my.tc.columbia.edu
2. Log into the portal by entering your UNI and Password and clicking the Log In button.
   
   Note: For assistance with UNI and Password, please contact Columbia University Information Technology at 212-854-1919 or askcuit@columbia.edu.
3. Once you have logged into the portal, click on the **TC Services** tab.
4. Click on the **EPAFs (Electronic Personnel Action Form)** link found in the **Self Service** channel under Payroll & Human Resources subtitle. This will take you to the EPAFs (Electronic Personnel Action Form) page.
5. Select New EPAF link under Electronic Personnel Action Form page.
6. Enter the TC ID of the employee for whom you are taking an action in the **ID** field and press the **Tab** on your keyboard.
   
   Note: You must enter an upper case ‘T’ in the TC ID.

   If you do not know the employee’s TC ID, click on the magnifying glass icon to go to the Person Search page.
   
   • Click on the **Employee** radio button. This will limit your search to employee records in Banner.
   • Enter the employee’s last name in the **Last Name** field.
   • Enter the employee’s first name in the **First Name** field.
   • Click the **GO** button. This will take you to the Person Search Results Page.
   • Click on the ID to select the person.
7. Under the **Query Date** field, current date will default.
   
   Note: The query date must equal the appointment effective date.
8. Press the **Tab** key on your keyboard to navigate to the Approval Category field.
9. Click the dropdown arrow in this field to access the Approval Categories available.
Step 2: Processing Transaction

EPAF: College Work Study - Rehire Appointment, CWSREH

This EPAF is used to rehire an employee into a previous College Work Study position. The EPAF is only to be used for those CWS employees who have worked as a Work Study in the past and whose Work Study appointment was previously terminated. This EPAF can only be used for employees who have been employed by the College before.

1. In the Approval Category field on New EPAF Person Selection page, click on College Work Study – Rehire Appointment.
2. Change the Query Date (MM/DD/YYYY) to the date that the Work Study began their appointment.
   
   Note: The Query Date must be updated with the employee’s actual start date. If this date does not reflect the actual start date, the EPAF will not be able to submit successfully.
   
   Note: The date you enter in Query Date on the New Person Selection page will automatically populate in the Effective Date fields on the EPAF. The Query Date and the Labor Effective Date must match.
3. Click on the GO button to navigate to the New EPAF Job Selection page.
4. Click the All Jobs button. Select the appropriate ‘999999’ job you wish to reappoint from the table by clicking on the radio button. Then click GO to navigate to Electronic Personnel Action Form page.
   
   Note: Employees may hold multiple jobs; make sure to select the correct job. The Status (located next to the radio button) should say Terminated.
5. The date you entered in Query Date on the New EPAF Person Selection will automatically populate in the Effective Date fields.
   
   Note: The Query Date and the Labor Effective Date must match.
   
   Note: The date format (MM/DD/YYYY) is required. This date must be greater than the employee’s Last Paid Date which can be found near the top of this page.
6. Under New Value next to Timesheet Orgn, enter the index that the employee is being paid from.
   
   Note: The number must start with ‘1’ and match the number entered in the Labor Distribution New Index field.
7. Enter the Supervisor TC ID or UNI in the New Value column under Supervisor TC ID/UNI:
   a. To locate a supervisor’s UNI, log into your TC email account. Enter the supervisor’s name in the TO: field. A listing of email aliases will populate for the employee. Find the UNI alias.
      Copy the UNI and paste it into the Supervisor TC ID or UNI in the New Value column.
   
   Note: The Supervisor TC ID/UNI is a required field. It is case sensitive and must be inputted in UPPER CASE. The TC ID/UNI will be used to give the employee access to their time sheets.
8. The date you entered in Query Date on the New EPAF Person Selection will automatically populate in the Labor Distribution Change’s New Effective Date field.
   
   Note: The Query Date and the Labor Effective Date must match.
9. In the Labor Distribution Change table, the Chart of Accounts (COA) automatically populates, as well as the previous Index, Fund, and Organization numbers, the Work Study Account number (7829) and ‘100.00’ in Percent. To make a change, follow these steps:
   a. To change the index number on the labor row, remove the Index number and type in the same index number entered on Timesheet Orgn. Do not change anything else in the labor row.
   b. Click Save and Add New Rows. The entire row will automatically update (including the Fund and Organization number).

10. Update the Routing Queue for the EPAF by selecting the Department Level Approval, Financial Aid, and HRIS Apply Approval Levels.

    Note: You can establish Default Routing Queues to avoid the following steps. Please see chapter 3.
    a. Click on the magnifying glass next to the Department Level Approval Level.
    b. Click on the name of the Department Level Approval assigned to your department and click Select.
    c. Click on the magnifying glass next to the Financial Aid Approval Level.
    d. Click on Hutto, Katherine and click Select.
    e. Click on the magnifying glass next to the HRIS Apply Level.
    f. Click on Lantigua, Deana and click Select.

11. Enter comments in the Comment box.

12. Click on the Save and Add New Rows button.

   Note: Your comments will be saved to the EPAF. To view your comments, click on the yellow paper next to the Comment field, which will also allow you to preview your EPAF before submitting. You can also Delete or Void the EPAF from the preview screen. To return to the EPAF from the preview screen, click ‘Update.’

13. When you get confirmation that your change was saved successfully, click the Submit button.

   Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. Directly above the status, you can also find a five-digit transaction number which can be used as a reference to get an update on the status of the EPAF. If you see an error(s), your transaction did not submit successfully.

**EPAF: College Work Study – Labor and/or Hourly Rate Change, CWRALA**

This EPAF is used to change the job labor distribution or increase the hourly rate of current College Work Study employees. This EPAF can only be used to make future changes. In the EPAF Comments section, indicate the day the labor and/or rate change should have been effective. If retro payments are needed, HRIS will make the necessary adjustments.
1. In the Approval Category field on New EPAF Person Selection page, click on College Work Study – Labor and/or Hourly Rate Change, CWRALA.

2. Change the Query Date (MM/DD/YYYY) to the date that the labor and/or raise change should go into effect.

   Note: The Query Date must be updated with the actual start date of the labor and/or rate change. If this date does not reflect the actual start date of the change, the EPAF will not be able to submit successfully.

   Note: The date you enter in Query Date on the New Person Selection page will automatically populate in the Effective Date fields on the EPAF. The Query Date and the Labor Effective Date must match.

3. Click on the GO button to navigate to the New EPAF Job Selection page.

4. Select the active ‘999999’ position with the correct department name by clicking on the radio button under Select on the far right.

   Note: The New EPAF Job Selection page shows the employee’s Last Paid Date on the right next to Status. The Effective Date at the top of the page matches the Query Date entered on the previous page (New EPAF Person Selection). If the Effective Date/Query Date both show dates that are before the Last Paid Date, the Query Date must be changed to a day after the Last Paid Date. To do this, press the BACK button on your browser to return to the New EPAF Person Selection page. Change the Query Date, then click GO.

5. The date you entered in Query Date on the New EPAF Person Selection will automatically populate in the Effective Date field.

   Note: The Query Date, the Job Effective Date, and the Labor Effective Date must all match.

   Note: The date format (MM/DD/YYYY) is required. This date must be greater than the employee’s Last Paid Date which can be found near the top of this page. If the Effective Date is before the employee’s Last Paid Date, use the BACK button on your browser to return to the New EPAF Person Selection page to update the Query Date.

6. If you wish to make a change to the hourly wage amount for the Work Study job, enter the new hourly rate into the Hourly Rate field under the New Value column.

7. The current job labor information will automatically populate under Labor Distribution Change. The current job labor information as well as the Query Date will also populate under New.

   IF YOU DO NOT NEED TO MAKE A LABOR DISTRIBUTION CHANGE, LEAVE THE FIELDS AS THEY ARE. If you need to make a change, follow these steps:

   a. To change the index number on the labor row, remove the index number under Index and change it to the new index. The entire row will automatically update (including the Fund and Organization number).

   b. If you need to add (+) a second labor row (for multiple indexes), click on the second line under COA and type ‘1.’ Then enter the index number in the Index field, and then enter the number (7829) under Account field. Type in the percentage (XX.XX) in the Percent field. Click Save and Add New Rows. The entire row will automatically update (including the Fund and Organization number).
c. If you need to remove (-) an entire labor row, clear out the contents in each field (i.e. the following should become blank: COA, Index, Fund, Organization, Account, Program, and Percent). Then click Save and Add New Rows. The entire row will automatically update (including the Fund and Organization number).

d. If you need to change the percentage (%) for a labor row, click on Percent for the first row and change the number. Then change the number in the second Percent row, and so on. Then click Save and Add New Rows. The entire row will automatically update (including the Fund and Organization number).

*Note: All labor percentages must add up to 100%. If you receive an error, refer to the Errors section for more information.*

8. Update the Routing Queue for the EPAF by selecting the Department Level Approval, Financial Aid, and HRIS Apply Approval Levels.

*Note: You can establish Default Routing Queues to avoid the following steps. Please see chapter 3.*

   a. Click on the magnifying glass next to the Department Level Approval Level.

   b. Click on the name of the Department Level Approval assigned to your department and click Select.

   c. Click on the magnifying glass next to the Financial Aid Approval Level.

   d. Click on Hutto, Katherine and click Select.

   e. Click on the magnifying glass next to the HRIS Apply Level.

   f. Click on Lantigua, Deana and click Select.

9. Type the start date of and the reason for the rate and/or labor change in the Comment field.

10. Click on the Save and Add New Rows button.

   *Note: Your comments will be saved to the EPAF. To view your comments, click on the yellow paper next to the Comment field, which will also allow you to preview your EPAF before submitting. You can also Delete or Void the EPAF from the preview screen. To return to the EPAF from the preview screen, click ‘Update.’*

11. When you get confirmation that your change was saved successfully, click the Submit button.

   *Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. Directly above the status, you can also find a five-digit transaction number which can be used as a reference to get an update on the status of the EPAF. If you see an error(s), your transaction did not submit successfully.*

**EPAF: College Work Study – Transfer to Interim Position, CWSXFR**

This EPAF is used to transfer a College Work Study employee to an Interim position. The EPAF is only to be used for those Work Study employees who have an active Work Study appointment and should now be paid as an Interim. **Important:** This EPAF cannot be used to rehire a Work Study onto a previously terminated Interim
position. If your employee has worked as an interim in your department in the past and that position was terminated, you will need to use PageUp and go through the appropriate process. If you have any questions about this, please contact the HR Help desk at ext. 3175.

Please note that the employee’s Work Study appointment will not be terminated through this transfer EPAF. To terminate a Work Study position permanently, refer to the Termination EPAF section.

1. In the Approval Category field on New EPAF Person Selection page, click on College Work Study – Transfer to Interim Position, CWSXFR.

2. Change the Query Date (MM/DD/YYYY) to the date that the transfer should go into effect.

   Note: The Query Date must be updated with the actual start date of the Interim position. If this date does not reflect the actual start date of the Interim position, the EPAF will not be able to submit successfully. This date will automatically populate in the Effective Date field on the EPAF.

   Note: The Query Date, the Job Effective Date, and the Labor Effective Date must all match.

3. Click on the GO button to navigate to the New EPAF Job Selection page.

   On the New EPAF Job Selection page, click on the empty box under Position next to New Job. You will be typing in the Interim position number that correlates with your department index. If you have questions about which Interim position number to enter, contact the HR Call center at ext. 3175.

4. Type in the Interim Position number for your department and ‘00’ in Suffix.

   Note: The page will refresh so that Title and Time Sheet Organization will automatically populate with the appropriate values.

   Note: If the employee already has a job showing the same Interim Position number and “00” active (look at Status to see if the Interim position is active), and you wish to create a new Interim job for the employee in your department, you will need to type “01” in the empty Suffix box.

5. Make sure the New Job radio button on the far right under Select is selected. Then click GO.

6. The date you entered in Query Date on the New EPAF Person Selection will automatically populate in the Effective Date field.

   Note: The Query Date, the Job Effective Date, and the Labor Effective Date must all match.

   Note: The date format (MM/DD/YYYY) is required.

7. Select the Contract Type. This button indicates whether the position is ‘Primary’ or ‘Secondary’ (do not select ‘Overload’). Click on the dropdown button to select from the options. If you are not sure whether the position is ‘Primary’ or ‘Secondary,’ click on the browser’s BACK button to return to the New EPAF Person Selection page. Look under Type to see if the employee already has a Primary job.

   a. If the employee has a ‘Primary’ job, click GO to return to the Electronic Personnel Action Form page and select ‘Secondary’ under Contract Type.

   b. If the employee only has a ‘Secondary’ job(s), click GO to return to the Electronic Personnel Action Form page and select ‘Primary’ under Contract Type.

8. Enter the appointment hourly rate under the New Value column next to Hourly Rate.
9. Under **New Value** next to **Timesheet Orgn**, enter the index that the employee is being paid from.

10. Enter the **Supervisor TC ID or UNI** in the **New Value** column under **Supervisor TC ID/UNI**:
   - a. To locate a supervisor’s UNI, log into your TC email account. Enter the supervisor’s name in the TO: field. A listing of email aliases will populate for the employee. Find the UNI alias. Copy the UNI and paste it into the **Supervisor TC ID or UNI** in the **New Value** column.

   **Note:** The **Supervisor TC ID/UNI** is a required field. It is case sensitive and must be inputted in **UPPER CASE**. The TC ID/UNI will be used to give the employee access to their time sheets.

11. The date you entered in **Query Date** on the **New EPAF Person Selection** will automatically populate in the **Labor Distribution Change**’s **Effective Date** field.

   **Note:** The **Query Date**, the **Job Effective Date**, and the **Labor Effective Date** must all match.

12. In the **Labor Distribution Change** table, the Chart of Accounts (COA) automatically populates the **Index**, **Fund**, **Organization**, **Account** (Interim account = 6254) numbers and labor distribution fields associated with this position. The **Percent** field will default to ‘100.00’.

   **Note:** The only changes allowed to the Labor Distribution will be for Grant funded positions (Indices starting with ‘5xxxxx’). To make a change, follow these steps:
   - a. To change the index number on the labor row, remove the defaulted labor distribution information and update the Index and Account to the appropriate values.
   - b. Click **Save and Add New Rows**. The entire row will automatically update (including the Fund and Organization number).

13. Update the **Routing Queue** for the EPAF by selecting the Department Level Approval, Budget/Grant, Financial Aid, and HRIS Apply Approval Levels.

   **Note:** You can establish Default Routing Queues to avoid the following steps. Please see chapter 3.
   - a. Click on the magnifying glass next to the Department Level **Approval Level**.
   - b. Click on the name of the Department Level Approval assigned to your department and click **Select**.
   - c. Click on the magnifying glass next to the Budget/Grant **Approval Level**.
     - i. For Budget approval level, click on Anderson, Joan and click **Select**.
     - ii. For Grants approval level, click on Hernandez, John and click **Select**.
   - d. Click on the magnifying glass next to the Financial Aid **Approval Level**.
   - e. Click on Hutto, Katherine and click **Select**.
   - f. Click on the magnifying glass next to the HRIS **Apply Level**.
   - g. Click on Lantigua, Deana and click **Select**.

14. Enter a **reason** for the transfer in the **Comment** box.
15. Click on the **Save and Add New Rows** button.

   *Note:* Your comments will be saved to the EPAF. To view your comments, click on the yellow paper next to the **Comment** field, which will also allow you to preview your EPAF before submitting. You can also Delete or Void the EPAF from the preview screen. To return to the EPAF from the preview screen, click ‘Update.’

16. When you get confirmation that your change was saved successfully, click the **Submit** button.

   *Note:* You can confirm that your EPAF was successfully submitted by reviewing the **Transaction Status** near the top of the page. It should be in a ‘Pending’ status. Directly above the status, you can also find a five-digit transaction number which can be used as a reference to get an update on the status of the EPAF. If you see an error(s), your transaction did not submit successfully.

**EPAF: Interim – Labor and/or Hourly Rate Change**

This is EPAF is used to change the job labor distribution or increase the hourly rate of current Interim employees. This EPAF can only be used to make future changes. In the EPAF Comments section, indicate the day the labor and/or rate change should have been effective. *If retro payments are needed, contact the HR Help Desk at ext. 3175.*

**Interim – Hourly Rate Change – Generating Operating, RAILAB**

It is important to note that this EPAF is only intended for changing an interim employee’s hourly rate of pay. If the job labor distribution needs to be updated, the job needs to be on a different pooled position. To determine the correct pooled position number, please contact Budget at ext. 3380.

1. In the **Approval Category** field, click on **Interim - Hourly Rate Change - General Operating**.
2. Change the **Query Date** to the date that the hourly rate change should go into effect.

   *Note:* The date format (MM/DD/YYYY) is required.

   *Note:* The query date must be updated with the actual start date of the hourly rate change. If this date does not reflect the actual start date of the change, the EPAF will not be able to submit successfully. This date will automatically populate in the **Effective Date** fields on the EPAF. The **Query Date** and the **Labor Effective Date** must match.
3. Click on the **GO** button to navigate to the **New EPAF Job Selection** page.

   Skip down to **Interim – Labor and/or Hourly Rate Change Processing** to continue.

**Interim – Labor and/or Hourly Rate Change – GRANTS, RAILAG**

**EPAF: Interim – Labor and/or Hourly Rate Change – (Grants), RAILAG**

**Interim – Labor and/or Hourly Rate Change – (Budget & Grants), RAILAS**

It is important to note that different indexes require different approval levels. If you are submitting a labor change for an index that starts with a ‘5’ (ex. 5XXXXX), make sure to select the Interim Labor and/or Hourly Rate Change for GRANT approval.

1. In the **Approval Category** field, click on **Interim – Labor and/or Hourly Rate Change (Grants), RAILAG**.
2. Change the **Query Date** to the date that the labor and/or rate change should go into effect.

   *Note: The date format (MM/DD/YYYY) is required.*

   *Note: The query date must be updated with the actual start date of the labor and/or rate change. If this date does not reflect the actual start date of the change, the EPAF will not be able to submit successfully. This date will automatically populate in the **Effective Date** fields on the EPAF. The **Query Date** and the **Labor Effective Date** must match.*

3. Click on the **GO** button to navigate to the **New EPAF Job Selection** page.

   Skip down to **Interim – Labor and/or Hourly Rate Change Processing** to continue.

**Interim – Labor and/or Hourly Rate Change – (Budget & Grants), RAILAS**

It is important to note that different indexes require different approval levels. If you are submitting a labor change for two or more indexes, one of which starts with a ‘1’ (ex. 1XXXXX), ‘2’ (ex. 2XXXXX), or ‘6’ (ex. 6XXXXX), and the other of which starts with a ‘5’ (ex. 5XXXXX), make sure to select the Interim Labor and/or Hourly Rate Change for BUDGET & GRANTS approval. This EPAF will be routed to Budget and Grants.

1. In the **Approval Category** field, click on **Interim – Labor and/or Hourly Rate Change (Budget & Grants), RAILAS**

2. Change the **Query Date** to the date that the labor and/or rate change should go into effect.

   *Note: The date format (MM/DD/YYYY) is required.*

   *Note: The query date must be updated with the actual start date of the labor and/or rate change. If this date does not reflect the actual start date of the change, the EPAF will not be able to submit successfully. This date will automatically populate in the **Effective Date** fields on the EPAF. The **Query Date** and the **Labor Effective Date** must match.*

3. Click on the **GO** button to navigate to the **New EPAF Job Selection** page.

   Skip down to **Interim – Labor and/or Hourly Rate Change Processing** to continue.

**Interim - Labor and/or Hourly Rate Change Processing**

Reminder: These EPAFs are only intended to update labor distributions for jobs that are grant or Budget & Grants (position number = T00000). For all other interim positions (funded by the general operating budget), you may only update the hourly rate.

1. On the **New EPAF Job Selection** page, select the Interim job you want to update with the correct department name by clicking on the **Select** radial button on the far right.

2. Click on the **GO** button to navigate to the **Electronic Personnel Action Form** page.

3. The date you entered in **Query Date** on the **New EPAF Person Selection** will automatically populate in the **Effective Date** field.

   *Note: The **Query Date**, the **Job Effective Date**, and the **Labor Effective Date** must all match.*
Note: The date format (MM/DD/YYYY) is required. This Query Date must be greater than the employee’s Last Paid Date which can be found near the top of this page. If the Effective Date is before the employee’s Last Paid Date, use the BACK button on your browser to return to the New EPAF Person Selection page to update the Query Date.

4. If you wish to make a change to the hourly wage amount for the Interim’s job, enter the new hourly wage rate into the Hourly Rate field under the New Value column.

Note: Please indicate in the Comments section whether the EPAF is a rate change, labor change, or both.

12. The current job labor information will automatically populate under Labor Distribution Change. The current job labor information as well as the Query Date will also populate under New. IF YOU DO NOT NEED TO MAKE A LABOR CHANGE, LEAVE THE FIELDS AS THEY ARE. If you need to make a change, follow these steps:

   e. To change the index number on the labor row, remove the index number under Index and change it to the new index. Click Save and Add New Rows. The entire row will automatically update (including the Fund and Organization number).

   f. If you need to add (+) a second labor row (for multiple indexes), click on the second line under COA and type ‘1.’ Enter the index number in the Index field, and then enter the account number (6254) under Account field. Type in the percentage (XX.XX) in the Percent field. Click Save and Add New Rows. The entire row will automatically update (including the Fund and Organization numbers).

   g. If you need to remove (-) an entire labor row, clear out the contents in each field (i.e. the following should become blank: COA, Index, Fund, Organization, Account, Program, and Percent). Then click Save and Add New Rows. The entire row will automatically update (including the Fund and Organization numbers).

   h. If you need to change the percentage (%) for a labor row, click on Percent for the first row and change the number. Then change the number in the second Percent row, and so on. Then click Save and Add New Rows. The entire row will automatically update (including the Fund and Organization numbers).

Note: All labor percentages must add up to 100%. If you receive an error, refer to the Errors section for more information.

5. Update the Routing Queue for the EPAF by selecting the Department Level Approval, Budget and/or Grants, and HRIS Apply Approval Levels.

Note: You can establish Default Routing Queues to avoid the following steps. Please see chapter 3.

a. Click on the magnifying glass next to the Department Level Approval Level.

b. Click on the name of the Department Level Approval for your department and click Select.

c. Click on the magnifying glass next to the Budget (or Grants) Approval Level(s).
d. Click on Anderson, Joan (for Budget) or Hernandez, John (for Grants) and click Select.
e. Click on the magnifying glass next to the HR Interim Apply Level.
f. Click on Macon, Netra and click Select.
g. Click on the magnifying glass next to the HRIS-A Apply Level.
h. Click on Lantigua, Deana and click Select.

6. Type the start date of and the reason for the rate and/or labor change in the Comment field.

7. Click the Save and Add New Rows button.

   Note: Your comments will be saved to the EPAF. To view your comments, click on the yellow paper next to the Comment field, which will also allow you to preview your EPAF before submitting. You can also Delete or Void the EPAF from the preview screen. To return to the EPAF from the preview screen, click ‘Update.’

8. When you get confirmation that your change was saved successfully, click the Submit button.

   Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. Directly above the status, you can also find a five-digit transaction number which can be used as a reference to get an update on the status of the EPAF. If you see an error(s), your transaction did not submit successfully.

SEMESTER BASED REAPPOINTMENTS

EPAFs: Course Assistant Reappointment, CAAPPT

Course Assistant Reappointment (Budget & Grants), CAAPTS

Before the start of the Fall, Spring & Summer semester, the HRIS Team will release a list of employees and their position numbers that are eligible for the Course Assistant Reappointment EPAF.

Note: In order to submit an EPAF for a Course Assistant, the appointment must fit the following criteria:

- The EPAF can only be used for reappointing Course Assistants from semester to semester (no new hires).
- Indices that are funded by operating budget (starting with ‘1xxxx’) cannot be changed.
- Indices that are funded by grants (starting with ‘5xxxx’) can be changed.
- The EPAF can only be used for Course Assistants on a regular term appointment schedule (Fall, Spring & Summer)

1. In the Approval Category field on New EPAF Person Selection page, click on the approval category based on funding.
   a. For not Budget & Grants, choose Course Assistant – Reappointment, CAAPPT
   b. For Budget & Grants, choose Course Assistant – Reappointment (Budget & Grants), CAAPTS

2. Click on the GO button to navigate to the New EPAF Job Selection Page.
3. Click on the **All Jobs** button. Select the appropriate Course Assistant job you wish to reappoint from the table by clicking on the radio button.

   *Note: Employees may hold multiple jobs; make sure to select the correct job.*

4. Click on the **GO** button to navigate to **Electronic Personnel Action Form** page.
   
   a. Several fields will be defaulted and are not enterable by user.

5. Enter the appointment salary under the **New Value** column under **Salary**.

6. Enter the actual reappointment start date under the **New Value** column under **Personnel Date**: **MM/DD/YYYY**.

7. You will see the current labor distribution change for the position highlighted. If you are appointing the employee to a summer term from a fall/spring term, update the new effective date.
   
   a. For Summer appointments, change the last digit of the account number only to ‘9’. (Do not change the index number).
   
   b. For Fall/Spring appointments, ensure that the account number ends in ‘2’.

8. Under the End Appointment section, enter the actual reappointment end date under the **New Value** column under **Personnel Date**: **MM/DD/YYYY**.

9. Enter the **Supervisor TC ID or UNI** in the **New Value** column under **Supervisor TC ID/UNI**:
   
   a. To locate a supervisor’s UNI, log into your TC email account. Enter the supervisor’s name in the TO: field. A listing of email aliases will populate for the employee. Find the UNI alias. Copy the UNI and paste it into the **Supervisor TC ID or UNI** in the **New Value** column.

   *Note: The **Supervisor TC ID/UNI** is a required field. It is case sensitive and must be inputted in **UPPER CASE**. The TC ID/UNI will be used to give the employee access to their time sheets.*

10. Define the **Routing Queue** for this EPAF by selecting the Academic Department Level Approval, Budget, Vice Provost’s Office, and HRIS **Approval Levels**.

    *Note: You can establish Default Routing Queues to avoid steps 6-10. Please see chapter 3.*

    a. For not Budget & Grants appointments, see below:

    i. Click on the magnifying glass next to the **Department or OSP Approver** and select the appropriate Director of Academic Administration for the appointment.

    ii. Click on the magnifying glass next to the **Budget/Grant**.

       1. For operating funded appointments, select **Anderson, Joan**.
       2. For grant funded appointments, select **Hernandez, John**.

    iii. Click on the magnifying glass next to **Vice Provost’s Office** and select **Torres-Irizarry, Iraida**.
iv. Click on the magnifying glass next to the **HRIS Apply** and select *Masbad, Johanna*.

b. For Budget & Grants appointments, see below:
   i. Click on the magnifying glass next to the **Department or OSP Approver** and select the appropriate Director of Academic Administration for the appointment.
   ii. Click on the magnifying glass next to the **Budget** and select *Anderson, Joan*.
   iii. Click on the magnifying glass next to the **Grants** and select *Hernandez, John*.
   iv. Click on the magnifying glass next to **Vice Provost’s Office** and select *Torres-Irizarry, Iraida*.
   v. Click on the magnifying glass next to the **HRIS Apply** and select *Masbad, Johanna*.

11. In the **Comment** field, type the course numbers associated with the position (if applicable).

12. Click on the **Save and Add New Rows** or the **Save** button.

   *Note: Your comments will be saved to the EPAF. To view your comments, click on the yellow paper next to the **Comment** field, which will also allow you to preview your EPAF before submitting. You can also Delete or Void the EPAF from the preview screen. To return to the EPAF from the preview screen, click ‘Update.’*

13. When you get confirmation that your change was saved successfully, click the **Submit** button.

   *Note: You can confirm that your EPAF was successfully submitted by reviewing the **Transaction Status** near the top of the page. It should be in a ‘Pending’ status. Directly above the status, you can also find a five-digit transaction number which can be used as a reference to get an update on the status of the EPAF. If you see an error(s), your transaction did not submit successfully.*

**EPAFs: RA/TA Reappointment, GRDAPP**

**RA/TA Reappointment (**Budget & Grants**), GRDAPS**

Before the start of the Fall and Spring semester, the HRIS Team will release a list of employees and their position numbers that are eligible for the Graduate Assistant Reappointment EPAF.

In order to submit an EPAF for a Graduate Assistant, the appointment must fit the following criteria:

- The EPAF can only be used for reappointing Graduate Assistants from semester to semester (no new hires).
- Indices that are funded by operating budget (starting with ‘1xxxxx’) cannot be changed.
- Indices that are funded by grants (starting with ‘5xxxxx’) can be changed.
- The EPAF can only be used for Graduate Assistants on a regular term appointment schedule (Fall, Spring & Summer)

1. In the **Approval Category** field on **New EPAF Person Selection**, click on the approval category based on funding.
   a. For not Budget & Grants, choose **RA/TA – Reappointment, GRADAPP**
   b. For Budget & Grants, choose **RA/TA – Reappointment (Budget & Grants), GRDAPS**

2. Click on the **GO** button to navigate to the **New EPAF Job Selection Page**.
3. Click on the **All Jobs** button. Select the appropriate RA/TA job you wish to reappoint from the table by clicking on the radio button.

*Note: Employees may hold multiple jobs; make sure to select the correct job.*

4. Click on the **GO** button to navigate to **Electronic Personnel Action Form** page.
   a. Several fields will be defaulted and are not enterable by user.

5. Enter the appointment salary under the **New Value** column under **Salary**.

6. Enter the actual reappointment start date under the **New Value** column under **Personnel Date:** **MM/DD/YYYY.**

7. You will see the current labor distribution change for the position highlighted. If you are appointing the employee to a summer term from a fall/spring term, update the new effective date.
   a. For Summer appointments, change the last digit of the account number only to ‘9’. (Do not change the index number).
   b. For Fall/Spring appointments, ensure that the account number ends in ‘2’.

8. Under the End Appointment section, enter the actual reappointment end date under the **New Value** column under **Personnel Date:** **MM/DD/YYYY.**

9. Enter the **Supervisor TC ID or UNI** in the **New Value** column under **Supervisor TC ID/UNI:**
   a. To locate a supervisor’s UNI, log into your TC email account. Enter the supervisor’s name in the TO: field. A listing of email aliases will populate for the employee. Find the UNI alias. Copy the UNI and paste it into the **Supervisor TC ID or UNI** in the **New Value** column.

   *Note: The **Supervisor TC ID/UNI** is a required field. It is case sensitive and must be inputted in **UPPER CASE**. The TC ID/UNI will be used to give the employee access to their time sheets.*

10. Define the **Routing Queue** for this EPAF by selecting the Department, Budget/Grants, Financial Aid and **HRIS Approval Levels**.

   *Note: You can establish Default Routing Queues to avoid steps 6-10. Please see chapter 3.*
   a. Click on the magnifying glass next to the **Department or OSP Approver**.
      i. For positions funded by Grants (partially or fully), choose your appropriate Office of Sponsored Programs (OSP) team member from the drop down menu.
      ii. For all other positions, choose the appropriate Director of Academic Administration for the appointment.
      iii. Iraida Torres should be selected as a department level approver for indices start with 2XXXXX.
   b. For the CONTR approval line, select the applicable users.
i. For positions that are fully funded by either Budget or Grants, select the appropriate department and user.
   1. For operating funded appointments, select *Anderson, Joan*.
   2. For grant funded appointments, select *Hernandez, John*.

ii. For positions that are split funded between Budget and Grants, input users into both approval lines.
   1. For operating funded appointments, select *Anderson, Joan*.
   2. For grant funded appointments, select *Hernandez, John*.

c. Click on the magnifying glass next to *Financial Aid* and select *Hutto, Katherine*.

d. Click on the magnifying glass next to the *HRIS Apply* and select *Masbad, Johanna*.

11. In the **Comment** field, type the course numbers associated with the position (if applicable).

12. Click on the **Save and Add New Rows** or the **Save** button.

   *Note: Your comments will be saved to the EPAF. To view your comments, click on the yellow paper next to the Comment field, which will also allow you to preview your EPAF before submitting. You can also Delete or Void the EPAF from the preview screen. To return to the EPAF from the preview screen, click ‘Update.’*

13. When you get confirmation that your change was saved successfully, click the **Submit** button.

   *Note: You can confirm that your EPAF was successfully submitted by reviewing the **Transaction Status** near the top of the page. It should be in a ‘Pending’ status. Directly above the status, you can also find a five-digit transaction number which can be used as a reference to get an update on the status of the EPAF. If you see an error(s), your transaction did not submit successfully.*

**EPAFs: PT Instructional Reappointment, PTIAPP**

**PT Instructional Reappointment (Budget & Grants), PTIAPS**

Before the start of the Fall and Spring semester, the HRIS Team will release a list of employees and their position numbers that are eligible for the Graduate Assistant Reappointment EPAF.

*In order to submit an EPAF for a Part Time Instructional reappointment must fit the following criteria:*

- The EPAF can only be used for Part Time Instructional reappointments from semester to semester (no new hires).
- Indices that are funded by operating budget (starting with ‘1xxxxx’) cannot be changed.
- Indices that are funded by grants (starting with ‘5xxxxx’) can be changed.
- The EPAF can only be used for PT Instructional reappointments on a regular term appointment schedule (Fall, Spring & Summer)

1. In the **Approval Category** field on **New EPAF Person Selection** page, click on the approval category based on funding.
   a. For not Budget & Grants, choose **PT Instructional Reappointment, PTIAPP**
   b. For Budget & Grants, choose **PT Instructional Reappointment (Budget & Grants), PTIAPS**

2. Click on the **GO** button to navigate to the **New EPAF Job Selection Page**.
3. Click on the All Jobs button. Select the appropriate PT Instructional job you wish to reappoint from the table by clicking on the radio button.

   Note: Employees may hold multiple jobs; make sure to select the correct job.

4. Click on the GO button to navigate to Electronic Personnel Action Form page.
   a. Several fields will be defaulted and are not enterable by user.

5. Enter the appointment salary under the New Value column under Salary.

6. Enter the actual reappointment start date under the New Value column under Personnel Date: MM/DD/YYYY.

7. You will see the current labor distribution change for the position highlighted. If you are appointing the employee to a summer term from a fall/spring term, update the new effective date.
   a. For Summer appointments, change the last digit of the account number only to ‘9’. (Do not change the index number).
   b. For Fall/Spring appointments, ensure that the account number ends in ‘2’.

8. Under the End Appointment section, enter the actual reappointment end date under the New Value column under Personnel Date: MM/DD/YYYY.

9. Enter the Supervisor TC ID or UNI in the New Value column under Supervisor TC ID/UNI:
   a. To locate a supervisor’s UNI, log into your TC email account. Enter the supervisor’s name in the TO: field. A listing of email aliases will populate for the employee. Find the UNI alias. Copy the UNI and paste it into the Supervisor TC ID or UNI in the New Value column.

   Note: The Supervisor TC ID/UNI is a required field. It is case sensitive and must be inputted in UPPER CASE. The TC ID/UNI will be used to give the employee access to their time sheets.

10. Define the Routing Queue for this EPAF by selecting the Academic Department Level Approval, Budget, Vice Provost’s Office, and HRIS Approval Levels.

    Note: You can establish Default Routing Queues to avoid steps 6-10. Please see chapter 3.
   a. For not Budget & Grants appointments, see below:
      i. Click on the magnifying glass next to the Department or OSP Approver and select the appropriate Director of Academic Administration for the appointment.
      ii. Click on the magnifying glass next to the Budget/Grant.
         1. For operating funded appointments, select Anderson, Joan.
         2. For grant funded appointments, select Hernandez, John.
      iii. Click on the magnifying glass next to Vice Provost’s Office and select Torres-Irizarry, Iraida.
iv. Click on the magnifying glass next to Human Resources Associate and select your appropriate Human Resources Generalist.

v. Click on the magnifying glass next to the HRIS Apply and select Masbad, Johanna.

b. For Budget & Grants appointments, see below:

i. Click on the magnifying glass next to the Department or OSP Approver and select the appropriate Director of Academic Administration for the appointment.

ii. Click on the magnifying glass next to the Budget and select Anderson, Joan.

iii. Click on the magnifying glass next to the Grants and select Hernandez, John.

iv. Click on the magnifying glass next to Vice Provost’s Office and select Torres-Irizarry, Iraida.

v. Click on the magnifying glass next to Human Resources Associate and select your appropriate Human Resources Generalist.

vi. Click on the magnifying glass next to the HRIS Apply and select Masbad, Johanna.

11. In the Comment field, type the course numbers associated with the position (if applicable).

12. Click on the Save and Add New Rows or the Save button.

Note: Your comments will be saved to the EPAF. To view your comments, click on the yellow paper next to the Comment field, which will also allow you to preview your EPAF before submitting. You can also Delete or Void the EPAF from the preview screen. To return to the EPAF from the preview screen, click ‘Update.’

13. When you get confirmation that your change was saved successfully, click the Submit button.

Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. Directly above the status, you can also find a five-digit transaction number which can be used as a reference to get an update on the status of the EPAF. If you see an error(s), your transaction did not submit successfully.

EPAFs: Community Teachers Reappointment, CMMUTY

Community Teachers Reappointment (Budget & Grants), CMMTSP

Before the start of the Fall, Spring & Summer semester, the HRIS Team will release a list of employees and their position numbers that are eligible for the Course Assistant Reappointment EPAF.

Note: In order to submit an EPAF for a Community Teachers, the appointment must fit the following criteria:

- The EPAF can only be used for reappointing Community Teachers from semester to semester (no new hires).
- Indices that are funded by operating budget (starting with ‘1xxxxx’) cannot be changed.
- Indices that are funded by grants (starting with ‘5xxxxx’) can be changed.
- The EPAF can only be used for Course Assistants on a regular term appointment schedule (Fall, Spring & Summer)
1. In the Approval Category field on New EPAF Person Selection page, click on the approval category based on funding.
   a. For not Budget & Grants, choose Community Teachers Reappointment, CMMUTY
   b. For Budget & Grants, choose Community Teachers Reappointment (Budget & Grants), CMMTSP

2. Click on the GO button to navigate to the New EPAF Job Selection Page.

3. Click on the All Jobs button. Select the appropriate Course Assistant job you wish to reappoint from the table by clicking on the radio button.

   Note: Employees may hold multiple jobs; make sure to select the correct job.

4. Click on the GO button to navigate to Electronic Personnel Action Form page.
   a. Several fields will be defaulted and are not enterable by user.

5. Enter the appointment salary under the New Value column under Salary.

6. Enter the actual reappointment start date under the New Value column under Personnel Date: MM/DD/YYYY.

7. You will see the current labor distribution change for the position highlighted. If you are appointing the employee to a summer term from a fall/spring term, update the new effective date.
   a. For Summer appointments, change the last digit of the account number only to ‘9’. (Do not change the index number).
   b. For Fall/Spring appointments, ensure that the account number ends in ‘2’.

8. Under the End Appointment section, enter the actual reappointment end date under the New Value column under Personnel Date: MM/DD/YYYY.

9. Enter the Supervisor TC ID or UNI in the New Value column under Supervisor TC ID/UNI:
   a. To locate a supervisor’s UNI, log into your TC email account. Enter the supervisor’s name in the TO: field. A listing of email aliases will populate for the employee. Find the UNI alias. Copy the UNI and paste it into the Supervisor TC ID or UNI in the New Value column.

   Note: The Supervisor TC ID/UNI is a required field. It is case sensitive and must be inputted in UPPER CASE. The TC ID/UNI will be used to give the employee access to their time sheets.

10. Define the Routing Queue for this EPAF by selecting the Academic Department Level Approval, Budget, Vice Provost’s Office, and HRIS Approval Levels.

    Note: You can establish Default Routing Queues to avoid steps 6-10. Please see chapter 3.
    a. For not Budget & Grants appointments, see below:
i. Click on the magnifying glass next to the **Department or OSP Approver** and select the appropriate Director of Academic Administration for the appointment.

ii. Click on the magnifying glass next to the **Office of School & Community Partner** and select **Hawley, Amy**.

iii. Click on the magnifying glass next to the **Budget/Grant**.
   1. For operating funded appointments, select **Anderson, Joan**.
   2. For grant funded appointments, select **Hernandez, John**.

iv. Click on the magnifying glass next to **Human Resources Associate** and select your appropriate Human Resources Generalist.

v. Click on the magnifying glass next to the **HRIS Apply** and select **Masbad, Johanna**.

b. For Budget & Grants appointments, see below:
   i. Click on the magnifying glass next to the **Department or OSP Approver** and select the appropriate Director of Academic Administration for the appointment.

   ii. Click on the magnifying glass next to the **Office of School & Community Partner** and select **Hawley, Amy**.

   iii. Click on the magnifying glass next to the **Budget** and select **Anderson, Joan**.

   iv. Click on the magnifying glass next to the **Grants** and select **Hernandez, John**.

   v. Click on the magnifying glass next to **Human Resources Associate** and select your appropriate Human Resources Generalist.

   vi. Click on the magnifying glass next to the **HRIS Apply** and select **Masbad, Johanna**.

11. In the **Comment** field, type the course numbers associated with the position (if applicable).

12. Click on the **Save and Add New Rows** or the **Save** button.

   *Note: Your comments will be saved to the EPAF. To view your comments, click on the yellow paper next to the **Comment** field, which will also allow you to preview your EPAF before submitting. You can also Delete or Void the EPAF from the preview screen. To return to the EPAF from the preview screen, click ‘Update.’*

13. When you get confirmation that your change was saved successfully, click the **Submit** button.

   *Note: You can confirm that your EPAF was successfully submitted by reviewing the **Transaction Status** near the top of the page. It should be in a ‘Pending’ status. Directly above the status, you can also find a five-digit transaction number which can be used as a reference to get an update on the status of the EPAF. If you see an error(s), your transaction did not submit successfully.*

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**EPAFs: Reappointment General, REAPP**

**Reappointment General, (Budget & Grants), REAPP**
1. In the Approval Category field on New EPAF Person Selection page, click on the approval category based on funding.
   a. For positions funded solely by the general operating budget OR funded solely by grants choose Reappointment General, REAPP
   b. For positions funded by both the general operating budget AND grants, choose Reappointment General, (Budget & Grants), REAPS
2. Click on the GO button to navigate to the New EPAF Job Selection Page.
3. Click on the All Jobs button. Select the appropriate terminal job you wish to reappoint from the table by clicking on the radio button.
   Note: Employees may hold multiple jobs; make sure to select the correct job.
4. Click on the GO button to navigate to Electronic Personnel Action Form page.
   a. Several fields will be defaulted and are not enterable by user.
5. Enter the annual salary under the New Value column under Salary for salaried employees. For non-exempt (hourly paid) employees, enter the hourly pay rate under Hourly Rate.
   Note: DO NOT PUT BOTH AN ANNUAL SALARY AND AN HOURLY RATE.
6. Enter the Effective Date in the New Value column under Effective Date: MM/DD/YYYY. –This will be the beginning of the new appointment.
7. Enter the Start Date in the New Value column under Personnel Date: MM/DD/YYYY. –This will be the beginning of the new appointment.
8. Enter the Supervisor TC ID or UNI in the New Value column under Supervisor TC ID/UNI:
   a. To locate a supervisor’s UNI, log into your TC email account. Enter the supervisor’s name in the TO: field. A listing of email aliases will populate for the employee. Find the UNI alias. Copy the UNI and paste it into the Supervisor TC ID or UNI in the New Value column.
   Note: The Supervisor TC ID/UNI is a required field. It is case sensitive and must be inputted in UPPER CASE. The TC ID/UNI will be used to give the employee access to their time sheets.
9. In the Labor Distribution Change table, the Chart of Accounts (COA) automatically populates, as well as the previous Index, Fund, Organization numbers, and the Account number and the associated percentage values in Percent. To make a change, follow these steps:
   a. To update the New Job Labor Distribution, you can remove the existing rows or update them by changing the Percent. To remove an existing line, change the Percent to .00 and click Save and Add New Rows. A Remove radio button will appear at the last column.
   b. Add new line of labor distribution by entering the COA = ‘1’
c. Enter the Index.

d. Click the Default from Index button.

e. Enter the Account and Percent for each line of labor distribution.

f. Ensure that the Percent Total = 100.00

g. Click Remove from job labor distribution that you want to delete.

h. Click Save and Add New Rows.

10. Under the End Appointment section, enter the actual reappointment end date under the New Value column under Personnel Date: MM/DD/YYYY.

11. Define the Routing Queue for this EPAF by selecting the Academic Department Level Approval, Budget, Vice Provost’s Office, and HRIS Approval Levels.

Note: You can establish Default Routing Queues to avoid steps 6-10. Please see chapter 3.

a. For not split funded appointments, see below:

i. Click on the magnifying glass next to the Department Level Approval and select the person in your department who is responsible for reviewing personnel transactions.

ii. Click on the magnifying glass next to the Department Level 2nd Approval and if necessary, select the name of the additional approver from your department. If no additional approvers are needed, select the same user chosen in the previous level.

iii. Click on the magnifying glass next to the Budget/Grants.

   1. For operating funded appointments, select Anderson, Joan.
   
   2. For grant funded appointments, select Hernandez, John.

iv. Click on the magnifying glass next to Human Resources Associate and select your appropriate Human Resources Generalist.

v. Click on the magnifying glass next to the HRIS Apply and select Masbad, Johanna.

b. For Budget & Grants appointments, see below:

i. Click on the magnifying glass next to the Department Level Approval and select the person in your department who is responsible for reviewing personnel transactions.

ii. Click on the magnifying glass next to the Department Level 2nd Approval and if necessary, select the name of the additional approver from your department. If no additional approvers are needed, select the same user chosen in the previous level.

iii. Click on the magnifying glass next to the Budget and select Anderson, Joan.

iv. Click on the magnifying glass next to the Grants and select Hernandez, John.
v. Click on the magnifying glass next to **Human Resources Associate** and select your appropriate Human Resources Generalist.

vi. Click on the magnifying glass next to the **HRIS Apply** and select **Masbad, Johanna**.

12. For salaried employees, provide the appointment salary if less than a year in the **Comment** field.
   
   a. You are also able to input any additional supporting information in the **Comment** field.

13. Click on the **Save and Add New Rows** or the **Save** button.

   *Note: Your comments will be saved to the EPAF. To view your comments, click on the yellow paper next to the **Comment** field, which will also allow you to preview your EPAF before submitting. You can also Delete or Void the EPAF from the preview screen, click ‘Update.’*

14. When you get confirmation that your change was saved successfully, click the **Submit** button.

   *Note: You can confirm that your EPAF was successfully submitted by reviewing the **Transaction Status** near the top of the page. It should be in a ‘Pending’ status. Directly above the status, you can also find a five-digit transaction number which can be used as a reference to get an update on the status of the EPAF: Termination of Job, TERMJB*

EPAF: Termination of Job, TERMJB

1. In the **Approval Category** field on **New EPAF Person Selection**, click on **Termination of Job, TERMJB**.

2. Click on the **GO** button to navigate to the **New EPAF Job Selection Page**.

3. Select the appropriate job you wish to terminate from the table by clicking on the radio button.

   *Note: Employees hold multiple jobs; make sure to select the correct job. If the termination effective date is earlier than the last pay date, enter the last paid date as the effective date. Please enter the employee’s last day worked in the Comments section.*

4. Click on the **GO** button to navigate to the **Electronic Personnel Action Form** page.

5. Enter the effective date of the job termination into the **Effective Date** field under the **New Value** column.

   *Note: The date format (MM/DD/YYYY) is required. If the termination effective date is earlier than the last pay date, enter the last paid date as the effective date. Please enter the employee’s last day worked in the Comments section.*

6. Enter the last date worked under the **New Value** column under **Personnel Date: MM/DD/YYYY**.

7. Define the **Routing Queue** for this EPAF by selecting the Human Resources Associate and HRIS Approval Levels.

   *Note: You can establish Default Routing Queues to avoid the following steps. See chapter 3.*

8. Click the magnifying glass next to the **Human Resources Associate** Approval Level and select the name of the Human Resources Associate assigned to your department and click select your appropriate Human Resources Generalist.
9. Click on the magnifying glass next to the HRIS Approval Level and click select Lantigua, Deana.

10. Type the Reason for Job Termination in the Comment field.

   Note: Termination Reason MUST be inputted into the comments section otherwise your EPAF will be not be processed and returned for correction.

   ![Sample Termination Reasons](image)

   Sample Termination Reasons
   - Resignation
   - Lay Off
   - Retirement
   - Termination for Cause
   - Graduation
   - Deceased
   - Transfer
   - End of Appointment/Assignment
   - Did Not Return from Leave

11. Click on the Save button.

   Note: Your comments will be saved to the EPAF. To view your comments, click on the yellow paper next to the Comment field, which will also allow you to preview your EPAF before submitting. You can also Delete or Void the EPAF from the preview screen. To return to the EPAF from the preview screen, click ‘Update.’

12. When you get confirmation that your change was saved successfully, click the Submit button.

   Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. Directly above the status, you can also find a five-digit transaction number which can be used as a reference to get an update on the status of the EPAF. If you see an error(s), your transaction did not submit successfully.

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**EPAF: Transfer, TRANS**

1. In the Approval Category field on New EPAF Person Selection, click on Transfer, TRANS.

2. Click on the GO button to navigate to the New EPAF Job Selection Page.

3. Select the appropriate job you wish to transfer from the table by clicking on the radio button.

   Note: Employees may hold multiple jobs; make sure to select the correct job

4. Click on the GO button to navigate to the Electronic Personnel Action Form page.

5. Enter the effective date of the transfer into the Effective Date field under the New Value column.

   Note: The date format (MM/DD/YYYY) is required.

6. Enter the last date worked on the job the employee is transferring from under the New Value column under Personnel Date: MM/DD/YYYY.

7. Define the Routing Queue for this EPAF by selecting the Human Resources Associate and HRIS Approval Levels.

   Note: You can establish Default Routing Queues to avoid the following steps. See chapter 3.
8. Click on the magnifying glass next to the Human Resources Associate Approval Level and select the name of the Human Resources Associate assigned to your department and click Select.

9. Click on the magnifying glass next to the HRIS Approval Level, click on Lantigua, Deana and click Select.

10. Type “Transfer” and the effective date in the Comment field.

11. Click on the Save and Add New Rows button.

   Note: Transfer Reason MUST be inputted into the comments section otherwise your EPAF will not be processed and returned for correction.

12. Type the Reason for Job Transfer in the Comment field.

   Note: Your comments will be saved to the EPAF. To view your comments, click on the yellow paper next to the Comment field, which will also allow you to preview your EPAF before submitting. You can also Delete or Void the EPAF from the preview screen. To return to the EPAF from the preview screen, click ‘Update.’

13. When you get confirmation that your change was saved successfully, click the Submit button.

   Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. Directly above the status, you can also find a five-digit transaction number which can be used as a reference to get an update on the status of the EPAF. If you see an error(s), your transaction did not submit successfully.

**EPAF: Updating an EPAF**

This section explains how to make changes to EPAFs. These include making changes to EPAFs that have been returned for correction or require other changes once an EPAF has been submitted.

**EPAFs that have been Returned for Correction**

1. If you receive a notification that indicates that you have an EPAF in your queue, click on EPAFS (Electronic Personal Action Forms) on the TC Services page.

2. Select the EPAF Originator Summary link under Electronic Personnel Action Form page.

3. In your Current tab, you will see any EPAFs that have been returned to you for correction.

   Note: You will be able to see that the EPAF has been Returned for Correction by checking the Transaction Status.

4. Click on the employee’s name or on the **Comments link to see why the EPAF was returned.

5. From the EPAF Preview screen you can choose to void or update the EPAF. Click on Void to remove the EPAF completely or Update to make changes. If you choose to update, you will be able to alter the salary, the routing queue, and add new comments.
6. Once you have updated the EPAF, **Save** and **submit** it.

**Making Changes to EPAFs**

This section describes how to make a change to an EPAF that has already been submitted to the next approval level.

1. Click on **EPAF Originator Summary**.
2. Click on the **History** tab.
3. Click on the name of the employee. You can also click on **Comments** to view any comments associated with the EPAF.
4. On the **EPAF Preview** page, the **Transaction Status** will either indicate ‘Pending,’ ‘Approved,’ ‘Waiting,’ or ‘Returned for Correction.’
   - **Pending** – The EPAF has not been approved by all approval levels and is not yet in the job system.
   - **Approved** – The EPAF has been approved by all approval levels and is in the job system.
   - **Waiting** – The EPAF has not been submitted by the EPAF originator. The EPAF will not go to the next approval level until it has been submitted.
   - **Returned for Correction** – The EPAF has been returned to the EPAF originator for changes. The EPAF will need to be updated and resubmitted.
5. You can also look at the **Routing Queue** in the **EPAF Preview** page to see who has approved the EPAF.
6. If you would like to make a change, there are three options in the **EPAF Preview** page: ‘return for correction,’ ‘void,’ and ‘add a comment.’ Click on one of the following choices:
   - **Returned for Correction** – By selecting this option, you are requesting that the EPAF be returned to your queue to make a change.
     *Note: This action will remove the EPAF from all of the Approval Level queues. The EPAF will not go to the next approval level until it is resubmitted.*
   - **Void** – By selecting this option, you are requesting that the EPAF be voided and removed completely from all approval levels.
   - **Add Comment** – By selecting this option, you will be able to add a comment to the existing EPAF. The new comment will show up to all approval levels but will not remove the EPAF from their queues.
7. If you click Return for Correction, click on Update to make a change to the Effective Date, salary, and/or comments.

8. Click the Save and Add New Rows button.

9. When you get confirmation that your change was saved successfully, click the Submit button.

Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. Directly above the status, you can also find a five-digit transaction number which can be used as a reference to get an update on the status of the EPAF. If you see an error(s), your transaction did not submit successfully.

Tracking an EPAF

As an EPAF originator or approver, you can track, review the status of, and make changes to your EPAF.

1. Click on EPAF Originator Summary or EPAF Approver Summary.

2. Click on the History tab.

3. Click on the name of the employee.

4. On the EPAF Preview page, the Transaction Status will either indicate ‘Pending,’ ‘Approved,’ ‘Waiting,’ or ‘Returned for Correction.’ Or ‘Completed’.

   - Pending – The EPAF has not been approved by all approval levels and is not yet in the job system.
   - Approved – The EPAF has been approved by all approval levels and is in the job system.
   - Waiting – The EPAF has not been submitted by the EPAF originator to the next approval level. The EPAF will not go to the next approval level until it has been submitted.
   - Returned for Correction – The EPAF has been returned to the EPAF originator for changes. The EPAF will need to be updated and resubmitted.
   - Completed – The EPAF has been approved, applied and processed in Banner.

5. You can also look at the Routing Queue in the EPAF Preview page to see who has approved the EPAF.
Chapter 3: Directions to Establish Default Routing Queues for EPAFs

1. Access the TC Portal with the following URL: https://my.tc.columbia.edu
2. Log into the portal by entering your UNI and Password and clicking the Log in button
   
   Note: For assistance with UNI and Password, please contact Columbia University Information Technology at 212-854-1919 or askcuit@columbia.edu
3. Once you have logged into the portal click on the TC Services tab.
4. Click on the EPAFs (Electronic Personnel Action Form) link found in the Self Service channel under Payroll & Human Resources subtitle. This will take you to the EPAFs (Electronic Personnel Action Form) page.
5. Click on the EPAF Originator Summary link.
6. Click on the Default Routing Queue link at the bottom of the page.
7. Click on the dropdown arrow in the Approval Category field to select the type of transaction and click GO.
8. Use the magnifying glass for each pre-defined Approval Level. Do not assign a username to a ‘non-selected’ Approval Level.
   
   Note: Where applicable, select a user that is assigned to your department.
9. Click on the Save and Add New Rows button.
10. You will get confirmation that your change was saved successfully at the top of the page.
   
   Note: If you encounter the following Routing Queue error: “User X is invalid for approval level.” Please contact HR Help Desk at ext. 3175.
Chapter 4: Proxy Set-Up

We encourage EPAF approvers to establish proxies who have permission to approve EPAFs on your behalf in the event that you are out of the office.

Setting up a Proxy

1. Go to MyTC portal - https://my.tc.columbia.edu/
2. Enter UNI and Password.
3. Select the TC Services tab.
4. Click on the EPAFs (Electronic Personnel Action Form) link found in the Self Service channel under Payroll & Human Resources subtitle.
5. Select EPAF Proxy Records.
6. Select an EPAF Approval Category from the dropdown. Click GO.
7. Select a name from the dropdown.
8. Check the box under Add.
9. Click Save.

*Note: You can have multiple proxies.*

Acting as a Proxy

1. Go to MyTC portal - https://my.tc.columbia.edu/
2. Enter UNI and Password.
3. Select the TC Services tab.
4. Click on the EPAFs (Electronic Personnel Action Form) link found in the Self Service channel under Payroll & Human Resources subtitle.
5. Select Act as a Proxy.
6. Select who you will be a proxy for from the dropdown.
7. Enter the dates you will act as a proxy.
8. Click GO.
Chapter 5: EPAF Troubleshooting

Below are instructions regarding common errors that result when attempting to submit an EPAF.

Errors – Termination/Transfer EPAFs

**Effective Date must be greater than Last Paid Date of [date]**

1. After attempting to submit an EPAF, if you receive an error that says “Transaction was not submitted. Please review errors,” refer to the Errors and Warning Messages table in the EPAF for more information.

2. If an error message table says *ERROR* Eff Date must be greater than Last Paid Date of [date], this means that you have selected to terminate the employee’s position prior to the Last Paid Date.
   a. If the employee’s job should have been terminated before the employee’s Last Paid Date, change the Effective Date to the Last Paid Date.

3. Update the Effective Date under New Value, then click Save.

4. When you get confirmation that your change was saved successfully, click the Submit button.
   
   Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s), your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.

**Date cannot be after the Base Job End Date of [date]/Begin Date must equal the first Jobs Detail Effective Date/End Date must be later than Begin Date**

**Effective Date/End Date must be later than Begin Date**

1. After attempting to submit a Transfer to Interim EPAF, if you receive an error that says “Transaction was not submitted. Please review errors,” refer to the Errors and Warning Messages table in the EPAF for more information.

2. If the error message table shows several errors including *ERROR* Date cannot be after the Base Job End Date of [date], *ERROR* Begin Date must equal the first Jobs Detail Effective Date, and *ERROR* End Date must be later than Begin Date, this means that the job you have selected to create through the Work Study Transfer to Interim EPAF has been terminated in the HR system and cannot be reappointed via an EPAF.

   Important: The EPAF you will most likely receive this error for is the College Work Study – Transfer to Interim. If you receive it for another type of EPAF, contact the HR Help Desk at ext. 3175.
   
   Note: At this time the HR department has decided not to create an additional EPAF to assist with reappointing previously terminated Interim positions via an EPAF.
3. Please delete the EPAF by clicking on the Delete button. Then, create a paper PAF for the Work Study Transfer to Interim Reappointment and submit to the Controller’s Office.

Note: If you have any questions, please contact the HR Help Desk at ext. 3175.

Errors – Reappointment EPAFs

Error: Salary must be filled in for Approval Type, BEGAPP

1. After attempting to submit the EPAF, if you receive an error that says “Salary must be filled in for Approval Type, BEGAPP,” this means you have tried to submit the EPAF without entering a salary for the appointment.
2. Enter a salary under New Value, then click Save.
3. When you get confirmation that your change was saved successfully, click the Submit button.

Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.

Error: Effective Date is prior to Last Date Paid.

1. After attempting to submit the EPAF, if you receive an error that says “New Job Labor Distribution Date should be >= query effective date,” this means the effective date you chose for the labor distribution is less than the last date paid.
2. You will need to update the effective date of the new labor distribution to a date AFTER the last paid date (this should not equal the last paid date).

Error: User ID(s) must be entered for Routing Queue

1. After attempting to submit the EPAF, if you receive an error that says “User ID(s) must be entered for Routing Queue,” this means you have tried to submit the EPAF without selecting Approval Levels for the EPAF.
2. Select approval levels (you can establish Default Routing Queues; please see chapter 3), then click Save.
3. When you get confirmation that your change was saved successfully, click the Submit button.

Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s), your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.
Errors – College Work Studies EPAFs

Employee ID and Base Job Errors

**Error: The Begin Date and Step must be entered for a new job**

1. After attempting to submit an EPAF, if you receive an error that says “**Transaction was not submitted. Please review errors,**” refer to the Errors and Warning Messages table in the EPAF in the EPAF for more information.
2. If the error message table says **ERROR* The Begin Date and Step must be entered for a new job, this means that the Job Begin Date field is empty.
3. Update the Job Begin Date field to match the Effective Date field, then Save and Submit.

Contract Type, Effective Dates, and Rate Errors

**Error: This employee already has a primary job**

1. After attempting to submit an EPAF, if you receive an error that says “**Transaction was not submitted. Please review errors,**” refer to the Errors and Warning Messages table in the EPAF in the EPAF for more information.
2. If the error message table says **ERROR* This employee already has a primary job, this means you have tried to submit the EPAF with the incorrect Contract Type.

   **Note:** Contract Type refers to primary or secondary job. If an employee already has a primary job, all additional jobs must be secondary. If an employee does not have a job or only has secondary jobs, the additional job must be primary.

   **Note:** A similar error may populate that says “The employee does not have a primary job.” This means that an employee does not have a primary job, so the new EPAF needs to be primary.
3. Change the Contract Type to either Primary or Secondary (the opposite of what the error says), then click Save.

   **Note:** Do not select ‘Overload.’ Only select ‘Primary’ or ‘Secondary.’
4. When you get confirmation that your change was saved successfully, click the Submit button.

   **Note:** You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.
Error: Invalid Date for Effective Date. Format is MM/DD/YYYY

1. After attempting to submit an EPAF, if you receive an error that says “Error(s) occurred,” refer to the Errors and Warning Messages table in the EPAF for more information.

2. If the error message table in the EPAF says Invalid Date for Effective Date. Format is MM/DD/YYYY, this means that you have input the format of the effective date incorrectly. Effective dates must be completely written out as MM/DD/YYYY.

3. Update the Effective Date under New Value and be sure to update the Effective Date under New Value, then click Save.

4. When you get confirmation that your change was saved successfully, click the Submit button.

   Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s), your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.

Error: Invalid value for Hourly Rate. Value entered must be numeric

1. After attempting to submit an EPAF, if you receive an error that says “Error(s) occurred,” refer to the Errors and Warning Messages table in the EPAF in the EPAF for more information.

2. If the error message table says Invalid value for Hourly Rate. Value entered must be numeric; this means non-numeric value was entered into the Hourly Rate field. The Hourly Rate field cannot contain dollar signs ($) or commas (,). Remove the incorrect value and click Save.

3. When you get confirmation that your change was saved successfully, click the Submit button.

   Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.

Error: Hourly Rate must be filled in for Approval Type

1. After attempting to submit an EPAF, if you receive an error that says “Error(s) occurred,” refer to the Errors and Warning Messages table in the EPAF in the EPAF for more information.

2. If the error message table says Hourly Rate must be filled in for Approval Type, this means you have tried to submit the EPAF without entering an hourly wage rate for the appointment.

3. Enter an hourly rate under New Value, then click Save.

4. When you get confirmation that your change was saved successfully, click the Submit button.

   Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.
Timesheet Orgn and Supervisor ID Errors

**Error: Timesheet Orgn must be filled in for Approval Type**

1. After attempting to submit an EPAF, if you receive an error that says *Timesheet Orgn must be filled in for Approval Type*, this means that you did not enter an index number in *Timesheet Orgn*. *Timesheet Orgn* is a required field.

   *Note: The number must start with ‘1’ and match the number entered in the Labor Distribution New Index field.*

2. Update the *Timesheet Orgn* then click *Save*.

3. When you get confirmation that your change was saved successfully, click the *Submit* button.

   *Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.*

**Error: Invalid Timesheet Orgn**

1. After attempting to submit an EPAF, if you receive an error that says “*Error(s) occurred*,” refer to the Errors and Warning Messages table in the EPAF in the EPAF for more information.

2. If the error message table says *Invalid Timesheet Orgn*, this means that a grant, gifted fund, or restricted fund was used in the *Timesheet Orgn* field. Only indexes that begin with ‘1’ can be entered into the *Timesheet Orgn* field.

3. Update the *Timesheet Orgn* then click *Save*.

4. When you get confirmation that your change was saved successfully, click the *Submit* button.

   *Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.*

**Error: Supervisor ID must be filled in for Approval Type**

1. After attempting to submit an EPAF, if you receive an error that says “*Error(s) occurred*,” refer to the Errors and Warning Messages table in the EPAF in the EPAF for more information.

2. If the error message table says *Supervisor TC ID/UNI \ must be filled in for Approval Type*, this means that you did not enter a Supervisor’s TC ID number under *Supervisor TC ID*. *Supervisor TC ID* is a required field.

   *Note: The TC ID must begin with an uppercase ‘T’. If using UNI, it is case sensitive and must be in all UPPER CASE*

3. Update the *Supervisor TC ID* then click *Save*.

4. When you get confirmation that your change was saved successfully, click the *Submit* button.

   *Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.*
**Error: Invalid Supervisor ID**

1. After attempting to submit an EPAF, if you receive an error that says “**Error(s) occurred**,” refer to the **Errors and Warning Messages** table in the EPAF for more information.

2. If the error message table in the EPAF says **Invalid Supervisor TC ID**, this means that the supervisor’s TC ID is either incomplete, incorrect,
   a. If using the TC ID, ensure that it has an UPPER CASE ‘T’ AND is eight characters long
   b. If using the UNI, ensure that it is in UPPER CASE
      i. To locate a supervisor’s UNI, log into your TC email account. Enter the supervisor’s name in the TO: field. A listing of email aliases will populate for the employee. Find the UNI alias. Copy the UNI and paste it into the **Supervisor TC ID or UNI** in the **New Value** column.

3. Update the **Supervisor TC ID/UNI** then click **Save**.

4. When you get confirmation that your change was saved successfully, click the **Submit** button.

   *Note: You can confirm that your EPAF was successfully submitted by reviewing the **Transaction Status** near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.*

**Job Labor Distribution Errors**

**Error: First Labor Dist Effective Date must equal the Job Begin Date**

1. After attempting to submit an EPAF, if you receive an error that says “**Transaction was not submitted. Please review errors**,” refer to the **Errors and Warning Messages** table in the EPAF for more information.

2. If the error message table says **ERROR* First Labor Dist Effective Date must equal the Job Begin Date**, this means that the **Effective Date** under **Labor Distribution Change** does not match **Job Begin Date** and/or **Effective Date** (both are near the top of the EPAF). These three dates must match and must be greater than or equal to the **Query Date**.

3. Update the **Effective Date** under **Labor Distribution Change** to match **Job Begin Date** (on New Hire and Transfer to Interim EPAFs) and/or **Effective Date** then click **Save**.

   *Note: Effective dates must be completely written out as MM/DD/YYYY.

4. When you get confirmation that your change was saved successfully, click the **Submit** button.
Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.

**Error: New Job Labor Distribution Date should be >= query effective date**

1. After attempting to submit an EPAF, if you receive an error that says “Error(s) occurred,” refer to the Errors and Warning Messages table in the EPAF for more information.
2. If the error message table says New Job Labor Distribution Date should be >= query effective date, this means that Job Begin Date, Effective Date, and/or Effective Date (under Labor Distribution Change) are not greater than or equal to the Query Date. These three dates must match and must be greater than or equal to the Query Date.
3. Update the Job Effective Date (on New Hire or Transfer to Interim EPAFs) and Effective Date under New Value, then update Effective Date under Labor Distribution Change. Click Save.
   
   Note: Effective dates must be completely written out as MM/DD/YYYY.
4. When you get confirmation that your change was saved successfully, click the Submit button.

Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.

**Error: The Index code XXXXXX is invalid**

1. After attempting to submit an EPAF, if you receive an error that says “Error(s) occurred,” refer to the Errors and Warning Messages table in the EPAF for more information.
2. If the error message table says The Index code XXXXXX is invalid. Please change, this means that the index number entered in Job Labor Distribution is invalid and can no longer be used. Please check the index number to make sure it was typed correctly.
   
   Note: If the index number is correct, contact Budget and Planning at ext. 4179 to make sure the index number is valid.
3. Update the Index field (and the Timesheet Orgn field if necessary), then click Save.
   
   Note: Effective dates must be completely written out as MM/DD/YYYY.
4. When you get confirmation that your change was saved successfully, click the Submit button.

Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.

**Error: Your Account Distribution information is missing**

1. After attempting to submit an EPAF, if you receive an error that says “Error(s) occurred,” refer to the Errors and Warning Messages table in the EPAF for more information.
2. If the error message table says *Your Account Distribution information is missing. Please add*, this means that text remains in a second row on the Labor Distribution Change part of the EPAF. Make sure that all rows, except for the first row of labor information, are blank (check COA and Percent in particular).

3. Update/clear out the inaccurate Labor information, then click Save.

4. When you get confirmation that your change was saved successfully, click the Submit button.

*Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.*

**Error: Account Code Required**

1. After attempting to submit an EPAF, if you receive an error that says “**Error(s) occurred,**” refer to the Errors and Warning Messages table in the EPAF for more information.

2. If the error message table says *Account code is required*, this means that the Account field on the Labor Distribution Change part of the EPAF is missing. Check to make sure the account number ‘7829’ for College Work Studies (or ‘6254’ for Interims) is filled in for the appropriate row on the Labor Distribution Change section of the EPAF.

*Note: EPAFs should only have one row of labor information.*

3. Update the inaccurate or missing Labor information, then click Save.

4. When you get confirmation that your change was saved successfully, click the Submit button.

*Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.*

**Error: Percent has not been entered**

1. After attempting to submit an EPAF, if you receive an error that says “**Error(s) occurred,**” refer to the Errors and Warning Messages table in the EPAF for more information.

2. If the error message table says *Percent has not been entered. Please add*, this means that the Percent field on the Labor Distribution Change part of the EPAF is missing. This could be due to placing an errant “1” in COA in a second row, which automatically populates ‘.00’ in Percent for that row. Make sure that all rows are updated accordingly and that all rows, except for the first row of labor information, are blank (check COA and Percent in particular).

3. Update/clear out the inaccurate Labor information, then click Save.

4. When you get confirmation that your change was saved successfully, click the Submit button.
Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.

**Error: Job Labor Distribution Total Percentages must be exactly 100%**
1. After attempting to submit an EPAF, if you receive an error that says **Job Labor Distribution Total Percentages must be exactly 100%**; this means that the percentages under Labor Distribution Change do not add up to 100%.

   *Note: This error can also occur if all rows under New Labor Distribution Change are blank. You must have labor distribution information entered in order to submit an EPAF.*
   *Note: If there is an error under Labor Distribution Change that says Invalid Position for Job Assignment; Salary Budget does not exist, this means that you must enter a ‘1’ in the COA field, then enter an index under Index and account number ‘7829’ under Account (for College Work Studies). The Percent should have ‘100.00’.*

2. Check the percentages listed under Labor Distribution Change. Make sure that they add up to 100%, or remove any errant percentages that shouldn’t be on the EPAF.

3. Once updated, click **Save**.

   *Note: If you continue to get this error after making sure the labor has been filled out correctly, you may need to delete the EPAF and start over from the New EPAF Selection screen.*

4. When you get confirmation that your change was saved successfully, click the **Submit** button.

   *Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.*

**Error: The Fund code X is invalid/The Organization code XXXXXX is invalid/The Program code XXX is invalid**
1. After attempting to submit an EPAF, if you receive an error that says “Error(s) occurred,” refer to the Errors and Warning Messages table in the EPAF for more information.

2. After attempting to submit an EPAF, if you receive an error that says **The Fund code X is invalid. Please change. The Organization code XXXXXX is invalid. Please change. The Program code XXX is invalid. Please change**; this means that there is left over text in a second row in the New Job Labor Distribution section. Be sure to clear out the COA, Index, Fund, Organization, Account, Program, and Percent in a second (or third) row, and be sure that the first row (or other rows that are being used to pay the employee) add up to 100%.

3. Once updated, click **Save**.

4. When you get confirmation that your change was saved successfully, click the **Submit** button.

   *Note: You can confirm that your EPAF was successfully submitted by reviewing the Transaction Status near the top of the page. It should be in a ‘Pending’ status. If you see an error(s) your transaction did not submit successfully. The EPAF will remain in your queue until resubmit the EPAF.*
Job Labor Distribution Errors

**Error: User ID(s) must be entered for Routing Queue**

1. If you receive an error that says “User ID(s) must be entered for Routing Queue,” you have tried to submit the EPAF without selecting Approval Levels under Routing Queue.
2. Select approval levels *(you can establish Default Routing Queues; please see chapter 3)*, then click **Save**.
3. When you get confirmation that your change was saved successfully, click the **Submit** button.

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**Chapter 6: EPAF Transaction Glossary**

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<tr>
<td>Approved</td>
<td>Transaction Status / Queue Status</td>
<td>Indicates that the transaction has been approved by all parties and ready to be applied to Banner</td>
</tr>
<tr>
<td>Complete</td>
<td>Transaction Status</td>
<td>Indicates that the transaction has been applied to Banner</td>
</tr>
<tr>
<td>Disapproved</td>
<td>Transaction Status / Queue Status</td>
<td>Indicates that the transaction has been disapproved by an approver</td>
</tr>
<tr>
<td>Pending</td>
<td>Transaction Status</td>
<td>Indicates that the transaction requires action by the approver(s)</td>
</tr>
<tr>
<td>Removed From Queue</td>
<td>Queue Status</td>
<td>Indicates that the transaction no longer needs your action</td>
</tr>
<tr>
<td>Return for Correction</td>
<td>Transaction Status / Queue Status</td>
<td>Indicates that the transaction has been returned to the Originator for update/correction</td>
</tr>
<tr>
<td>Void</td>
<td>Transaction Status</td>
<td>Indicates that the transaction has been voided by an originator or superuser and is no longer a valid transaction</td>
</tr>
<tr>
<td>Waiting</td>
<td>Transaction Status</td>
<td>Indicates that the transaction is in the process of being created</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Action Buttons Guide</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Action Buttons/Links</strong></td>
<td><strong>User Type</strong></td>
<td><strong>Function</strong></td>
</tr>
<tr>
<td>Approve</td>
<td>Approver(s)</td>
<td>The transaction will progress to the next level of approval in the transaction queue</td>
</tr>
<tr>
<td>Comment</td>
<td>Originator / Approver(s)</td>
<td>Available on all transactions for users as a free text field to share additional information</td>
</tr>
<tr>
<td>Disapprove</td>
<td>Approver(s)</td>
<td>The transaction will be removed from all levels of approvals and no further action will be possible</td>
</tr>
<tr>
<td>Return for Correction</td>
<td>Approver(s)</td>
<td>The transaction will be returned to the Originator for update/correction</td>
</tr>
<tr>
<td>Update</td>
<td>Originator</td>
<td>Available on transactions that have been returned for correction and the originator can make changes and submit for approval</td>
</tr>
<tr>
<td>Void</td>
<td>Originator</td>
<td>The transaction will be removed from all levels of approvals and no further action will be possible</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
</tbody>
</table>

**Summary Page Guide**

<table>
<thead>
<tr>
<th>Summary Page Tabs</th>
<th>User Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current</strong></td>
<td>Originator / Approver(s)</td>
<td>Transactions that require your action</td>
</tr>
<tr>
<td><strong>In My Queue</strong></td>
<td>Approver(s)</td>
<td>Transactions that will require your action after predecessor levels have been approved</td>
</tr>
<tr>
<td><strong>History</strong></td>
<td>Originator / Approver(s)</td>
<td>Transactions that you have already taken action on</td>
</tr>
</tbody>
</table>