MANAGERS’ & ORIGINATORS’ GUIDE

TO BANNER HUMAN RESOURCES

Electronic Personnel Action Forms (EPAFS)
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Chapter 1: Intro to 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 such as reappointments, compensation changes and terminations. These personnel transactions can be initiated for active employees only and needs to go through an approval process.

When to Use an ePAF?

We have a number of ePAFs that allow users to process a variety of personnel transactions for active employees at the College. The transaction types that an ePAF allows are as follows:

1. **Additional Compensation or Additional Jobs**
   The Additional Compensation or Additional Jobs ePAFs can be used to create or reinstate supplemental income, overages, bonuses, one-time payments or secondary jobs on an employee except for Executive, Union and Student employees. Executive, Union and Student employees are out of scope at this time and will be processed via paper PAFs.

2. **Adjustments to Active Jobs**
   The Adjustments to Active Jobs ePAFs can be used to process job terminations, salary or rate adjustments, labor updates, timesheet or leave report approver changes, and title updates. Salary adjustments for Executives and Student employees; and Step increases for Faculty and Lecturers are not supported at this time and will be processed via paper PAFs.

3. **Adjustments to Active Jobs – College Work Study and Interim**
   Separate ePAFs have been created to process adjustments to Active Jobs for College Work Study and Interim employees mainly due to the different approval workflows. These ePAFs allow updates to hourly rates, labor funding information, reappoint or transfer a College Work Study to an Interim employee.

4. **Reappointments**
   The Reappointment ePAFs can be used to reappoint employees with eligible job records. This means that the employee must have an active employment record AND must be returning to the same appointment that is (or will be) terminated by the begin date of the new reappointment. Reappointments may be year-round or semester based and the nuances between each will be discussed in the next section.

5. **Other**
There are few ePAFs that are offered to specific departments. These transactions include administration of Faculty sabbatical, grant funded position labor updates, and new hires.
How to Access ePAFs?

To access the ePAFs, log into the TC Portal, click on the Employee Resources tab, then navigate to the Human Resources section. Click on **EPAFS (Electronic Personal Action Forms)**.

**If you don’t see this link, please request ePAF access by submitting the HR Systems Access Request Form.**

You will be taken to the ePAF Home Page. You will be able to access a variety of the ePAF functions.
**EPAF Approver Summary**

If you are an EPAF Approver this link will take you to a listing of all EPAFs that are assigned to you as an approver.

Each tab will take you to separate listings of ePAFs.

- **Current** – This tab will show all ePAFs that are in your queue and are pending your approval.
- **In My Queue** – This tab will show a listing of ePAFs where you are listed as an approver, but has not yet reached your queue for approval
- **History** – This tab will show a listing of all ePAFs that you have approved

You can click the hyperlink on the employee name to take you directly to that specific ePAF. You will be able to review the ePAF and take whatever action you need.
EPAF Originator Summary

This will take you to a listing of ePAFs that you have submitted.

Each tab will take you to separate listings of ePAFs.

- **Current** – This will take you to a list of ePAFs that you have originated, but need further action by you. These are usually ePAF transactions that have been returned for correction or have not yet been submitted.
- **History** – This will take you to a listing of all ePAFs that you have submitted. You will be able to identify the status of the ePAF by looking at the Transaction Status field.

For your reference, here is a listing of Transaction Statuses and what they mean.

<table>
<thead>
<tr>
<th>Description</th>
<th>Action Sitting With</th>
<th>Action Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waiting</td>
<td>ePAF Originator</td>
<td>ePAF needs to be submitted; has errors or is incomplete</td>
</tr>
<tr>
<td>Pending</td>
<td>ePAF Approver</td>
<td>ePAF has been submitted, but needs approvals</td>
</tr>
<tr>
<td>Approved</td>
<td>ePAF Approver</td>
<td>ePAF has all approvals; needs to be processed</td>
</tr>
<tr>
<td>Completed</td>
<td>N/A</td>
<td>ePAF has been processed and applicable tables/records updated</td>
</tr>
<tr>
<td>Return for Correction</td>
<td>ePAF Originator</td>
<td>ePAF has been returned to originator for correction when an error is detected; ePAF can be updated, saved and submitted again</td>
</tr>
<tr>
<td>Cancelled</td>
<td>N/A</td>
<td>ePAF has been cancelled; no further action needed.</td>
</tr>
<tr>
<td>Voided</td>
<td>N/A</td>
<td>ePAF has been voided; no further action needed.</td>
</tr>
<tr>
<td>Disapproved</td>
<td>N/A</td>
<td>ePAF has been disapproved; no further action needed.</td>
</tr>
</tbody>
</table>
New EPAF
This will take you to the page where you are able to originate ePAFs.

New EPAF Person Selection

- Enter an ID or click the magnifying glass icon to search for an ID. Select the Transaction Type. Click Go

* - indicates a required field.

ID: * [Input field]

Query Date: MM/DD/YYYY [Input field]

Approval Category: * [Input field]

Go

Some key fields on this page are:

- **ID** – This is where you input the employee’s TCID number. This is the unique ID that is given to each person at the college.
  - If you do not know the TCID, you can utilize the search function.
    - Click the magnifying glass.
    - Input the Last Name & First Name.
    - Click Go.
    - A listing of people will populate. Select the correct person. The ID field will then populate.

- **Query Date** – This will automatically default to today’s date. Please update this to the effective date of the transaction. The effective date should be after the employee’s last paid date.
• **Approval Category** – This will provide you a dropdown listing of all the transactions that you can request for an employee.

**EPAF Proxy Records**
This will take you to a screen where you can remove or add proxies. One thing to note is that currently the system only allows for approver proxies. It does not allow for originator proxies. Please see Chapter 5 – EPAF Proxy Records.

**Act as a Proxy**
This will take you to the page where you are able to act as an approver proxy for someone else. In the dropdown menu in the Proxy For field, please select the name of the approver whom you need to proxy for. Please see Chapter 5 – Acting as a Proxy.

**ePAF Roles**
There are three roles you can have with the ePAFs.

<table>
<thead>
<tr>
<th><strong>EPAF ROLES</strong></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Originator</td>
<td>User who creates ePAFs and inputs approvers</td>
</tr>
<tr>
<td>Approver</td>
<td>Approve, Return for Correction</td>
</tr>
<tr>
<td>Proxy</td>
<td>Individual who acts in the place of an approver; **Currently the system does not support proxies for originators.</td>
</tr>
</tbody>
</table>
## Chapter 2: Detailed Listing of ePAFs

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>ePAF Approval Category</th>
<th>Availability</th>
<th>Personnel Transactions</th>
<th>Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Compensation or Job</td>
<td>Additional Job or Compensation - Salaried</td>
<td>Year Round</td>
<td>Supplemental income, overages, bonuses, one-time payments, Secondary job</td>
<td>Salaried except for Executive, Student, Union employees</td>
</tr>
<tr>
<td></td>
<td>Additional Job - Hourly</td>
<td>Year Round</td>
<td>Secondary job</td>
<td>Hourly except for Student, Union employees</td>
</tr>
<tr>
<td></td>
<td>Reinstate Job or Compensation (Salaried and Hourly)</td>
<td>Year Round</td>
<td>Supplemental income, overages, bonuses, one-time payments</td>
<td>Salaried and Hourly except for Executive, Student, Union employees</td>
</tr>
<tr>
<td></td>
<td>Additional Job - Salaried Student</td>
<td>Year Round</td>
<td>Additional Job</td>
<td>Student employees except College Work Study and Admin Fellows</td>
</tr>
<tr>
<td></td>
<td>Additional Job – College Work Study</td>
<td>Year Round</td>
<td>Additional Job</td>
<td>College Work Study employee</td>
</tr>
<tr>
<td>Adjustments to Active Jobs</td>
<td>Salary or Hourly Rate Update</td>
<td>Year Round</td>
<td>Salary, hourly rate, labor, timesheet/leave report approver, title updates</td>
<td>Salaried and Hourly except for Executive, Faculty/FT Lecturers &amp; Student employees</td>
</tr>
<tr>
<td></td>
<td>Salary Update – Faculty/ FT Lecturer</td>
<td>Year Round</td>
<td>Salary and/or Step Increases</td>
<td>Faculty and Full Time Lecturers</td>
</tr>
<tr>
<td></td>
<td>Labor Update</td>
<td>Year Round</td>
<td>Labor allocation updates</td>
<td>All except Executive, Student, Interim employees</td>
</tr>
<tr>
<td></td>
<td>Hourly Rate or Labor Update - interim</td>
<td>Year Round</td>
<td>Hourly rate, labor allocation updates</td>
<td>Interim employees</td>
</tr>
<tr>
<td></td>
<td>Hourly Rate or Labor Update - Work Study</td>
<td>Year Round</td>
<td>Hourly rate, labor allocation updates</td>
<td>College Work Study employees</td>
</tr>
<tr>
<td></td>
<td>Timesheet/Leave Approver or Title Update</td>
<td>Year Round</td>
<td>Timesheet/leave report approver, job title changes</td>
<td>All employees</td>
</tr>
</tbody>
</table>

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<th>Scope</th>
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<td>Year Round</td>
<td>Job termination</td>
<td>All employees</td>
</tr>
<tr>
<td>Job Termination for Transfer</td>
<td></td>
<td>Year Round</td>
<td>Job termination with the intent to transfer to another job</td>
<td>All employees</td>
</tr>
<tr>
<td>College Work Study Transfer to Interim</td>
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<td>Year Round</td>
<td>CWS Transfer to Interim position</td>
<td>College Work Study employees</td>
</tr>
<tr>
<td>Reappt - College Work Study</td>
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<td>Year Round</td>
<td>CWS Reappointment</td>
<td>College Work Study employees</td>
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<tr>
<td>Reappt - Sem Based, Community Teacher</td>
<td></td>
<td>Semester</td>
<td>Community Teacher Reappointment</td>
<td>Part Time instructional staff paid from account 6142 or 6149.</td>
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<tr>
<td>Reappt - Sem Based, Course Assistant</td>
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<td>Semester</td>
<td>Course Assistant Reappointment</td>
<td>Student employees paid from account 6422 or 6469.</td>
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<tr>
<td>Reappt - Sem Based, RA/TA</td>
<td></td>
<td>Semester</td>
<td>Research/Teaching Assistant Reappointment</td>
<td>Student employees paid from account 6422 or 6429.</td>
</tr>
<tr>
<td>Reappt - Sem Based, PT Instructional</td>
<td></td>
<td>Semester</td>
<td>PT Instructional Staff Reappointment</td>
<td>PT Instructional staff paid from accounts 6122/6129, 6132/6139 or 6152/6159.</td>
</tr>
<tr>
<td>Reappt - Summer A, FT Faculty*</td>
<td></td>
<td>Semester</td>
<td>Faculty reappointment for Summer A</td>
<td>Faculty members</td>
</tr>
<tr>
<td>Reappt - Summer B, FT Faculty*</td>
<td></td>
<td>Semester</td>
<td>Faculty reappointment for Summer B</td>
<td>Faculty members</td>
</tr>
<tr>
<td>Reappt - Year Round, Doctoral Research Fellow</td>
<td></td>
<td>Year Round</td>
<td>Doctoral Research Fellow Reappointment</td>
<td>Student employees paid from account 6442 or 6449.</td>
</tr>
<tr>
<td>Reappt - Year Round</td>
<td></td>
<td>Year Round</td>
<td>Reappointment</td>
<td>FT Faculty and Instructional, FT &amp; PT Professionals, Admin Fellows &amp; Interim</td>
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<td>Return from Sabbatical Leave</td>
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<td>All employee groups</td>
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<td></td>
<td><strong>PageUp Upload with Labor</strong></td>
<td>Year Round</td>
<td>New Hires with open ended appointments</td>
<td>All employees</td>
</tr>
<tr>
<td></td>
<td><strong>PageUp Upload with Labor EndDate</strong></td>
<td>Year Round</td>
<td>New Hires with terminal appointments</td>
<td>All employees</td>
</tr>
</tbody>
</table>

*Only available for the Vice Provost’s Office
**Only available for the Grants Office
***Only available for HRIS
Chapter 3: Step by Step ePAF Instructions

Additional Compensation or Job

Additional Compensation or Job - Salaried
This ePAF can be used to submit an additional compensation or additional job on a Salaried employee in the form of supplemental income, overage, bonus, one-time payment or secondary job. Executive, union and student employees are out of scope at this time and will be processed via paper PAFs. One-time payments for employee expenses > 90 days are also out of scope and will be processed via paper PAFs.

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<th>What you will see</th>
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</thead>
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<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field ('T' in TCID in caps).</td>
<td></td>
</tr>
<tr>
<td>Enter the Query Date. The Query Date should equal the effective date of the additional compensation or job.</td>
<td></td>
</tr>
<tr>
<td>Select Additional Job or Compensation – Salaried on the approval category and click Go.</td>
<td></td>
</tr>
</tbody>
</table>

**STEP 2: Specify Position Number and Suffix.**
For one-time payment, input position number OTP000 and suffix 00.
For guidance on the Position number to use for supplemental payment, refer to Determining a Position Number for a Supplemental Compensation for a FT Employee User Guide.
The Position Number should not have ever existed for the employee. To check, click All Jobs.
If Position Number has not existed for this employee, enter the Position Number and Suffix 00 for this ePAF.

If Position Number already exists for this employee for a Terminated job, use the Reinstateln Job or Compensation (Salaried or Hourly) ePAF instead.

If Position Number already exists for this employee for an Active job, increment the Suffix (i.e. from 00 to 01) for this ePAF.

**STEP 3: Input Begin Record Information.**

Enter the Actual Start Date for the following fields:

- Job Begin Date
- Effective Date
- Personnel Date

Enter the Timesheet Orgn. This is the same as the Organization field in the Funding Allocation section (Step 5). Input the index the transaction is being charged to and click Default from Index. Copy the value in the Organization field into the Timesheet Orgn field. If there are multiple indices, select the one with the highest %.

**To determine Timesheet Orgn**

If the Effective Date is before the Timesheet Start Date, the Timesheet Orgn is used for the following:

- Cost to Date
- Worked Hours
- Time and Worked Hours
- Timesheet Date

Otherwise, the Orgn from the Effective Date is used.
Update Job Change Reason. Dependent on the type of transaction, update the job change reason as follows:
• SUP if a Supplemental Income, Overage OR Bonus
• OTP if a One Time Payment
• ADL if Additional/New Secondary Job

Enter the new Supervisor TC ID/UNI in ALL CAPS. For Faculty payments, input the Department Chair.

Input the Factor and Pays.

Factor and Pays will be the same number. You will input the number of paychecks you would like the employee to receive for the appointment. You can count the number of paychecks by using the begin and end dates of the appointment. Refer to the payroll calendar for guidance.

If the additional Job or Compensation is a year or longer OR has no end date then enter 24 for semi-monthly, 26 for bi-weekly & 52 for weekly employees. For an academic year (Sept – May), input 18.

Enter the amount in the Salary field. This will be the pay for the period for this ePAF. Do not use ‘$’ or ‘,’.

STEP 4: Update earnings section.

Enter the job begin date on the effective date.

In the earnings drop down, select
• SUP If a supplemental Income or one-time payment
• OVR If overage
• BON if a bonus
• REG If an additional/new job

In the Hours or Units per Pay, enter 1. Click Save.

**STEP 5: Input the funding allocation.**

The Effective Date should match the begin date. This can only occur after the last paid date.

Confirm that the organization value from the funding matches the timesheet orgn from step 3.

For one-time payments, update the account to 6571.

**STEP 6: Input End Record Information**

Enter the Job end date in both the Effective Date and Personnel Date fields.

If the Job has no end date, enter 12/31/2027 and indicate no end date in the Comments section.

**STEP 7: Input Routing Queue.**

Click on the magnifying glass to enter approver for each approval level.

If your transaction needs to go through both the Budget AND Grants departments for approval, enter the budget approver in level 24 – CONTR Budget, Grants. Then, move to step 6A.

Otherwise, click Save and Add New. Move to Step 8.

**STEP 7A: Include Budget AND Grants as approvers in routing queue.**
Select an empty approval level row. From the drop down, select 27- Grants. Click the magnifying glass and select the approver. In Required Action, select Approve from the dropdown menu. Click Save and Add New to save.

STEP 8: If needed, add a comment (max 4000 chars):
Title: For secondary jobs, enter the title in the comments section.
No End Date: If this additional comp or job has no end date, indicate in the comments section. (Additional processing will be done by HRIS), Click Save when done.

STEP 9: Submit the ePAF.
Click the Submit button.
Once submitted successfully, the Transaction Status will be Pending. The ePAF will now go through the approval workflow.
### Additional Job – Hourly

This ePAF can be used to submit an additional job for an hourly employee except for Student and Union employees.

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<th>What you need to do</th>
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<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field (‘T’ in TC ID in caps).</td>
<td></td>
</tr>
<tr>
<td><strong>Enter the Query Date.</strong> The Query Date should equal the effective date of the</td>
<td></td>
</tr>
<tr>
<td>additional compensation or job. The effective date should also be after the</td>
<td></td>
</tr>
<tr>
<td>employee’s last paid date.</td>
<td></td>
</tr>
<tr>
<td>Select Additional Job – Hourly in the approval category. Click Go.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Specify Position Number</strong></td>
<td></td>
</tr>
<tr>
<td>Select All Jobs. In the “New Job” tab, enter the position number for the new job.</td>
<td></td>
</tr>
<tr>
<td>This position number must be one that the employee has NOT held before.</td>
<td></td>
</tr>
<tr>
<td>For Part Time employees, refer to [Determining a Position Number for Pooled Position</td>
<td></td>
</tr>
<tr>
<td>for a PT Employee User Guide.</td>
<td></td>
</tr>
<tr>
<td>If Position Number already exists for this employee for a Terminated job, use the</td>
<td></td>
</tr>
<tr>
<td>Reinstate Job or Compensation (Salaried or Hourly) ePAF instead.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 3: Input Begin Record</strong></td>
<td></td>
</tr>
<tr>
<td>Enter the Actual Start Date for the following fields:</td>
<td></td>
</tr>
<tr>
<td>Job Begin Date</td>
<td></td>
</tr>
<tr>
<td>Effective Date</td>
<td></td>
</tr>
<tr>
<td>Personnel Date</td>
<td></td>
</tr>
</tbody>
</table>
Enter the Timesheet Orgn. This is the same as the Organization field in the Funding Allocation section (Step 4). Input the index the transaction is being charged to and click Default from Index. Copy the value in the Organization field into the Timesheet Orgn field. If there are multiple indices, select the one with the highest %.

Enter new Supervisor TCID/UNI in caps.

Enter the hourly rate. The total amount for this job needs to be entered in the Comments section. Do not use ‘$’ or ‘,’.

STEP 4: Input the funding allocation.

The Effective Date can only occur after the last paid date and should match the begin date. Ensure the total is 100%.

STEP 5: Input End Record Information

Enter the end date of the appointment in both Effective Date and Personnel Date.

If the Job has no end date, 12/31/2027 and indicate no end date in the Comments section.

STEP 6: Input Routing Queue

Click on the magnifying glass to enter the approver for each approval level.

If this transaction needs to go through both Budget AND Grants approval, enter the budget approver in level 24 – (CONTR) Budget/Grant then go to step 6A.
Otherwise, click Save and Add New Rows and go to Step 7.

**STEP 6A: Include Budget AND Grants as approvers in routing queue.**

Select an empty approval level row. From the drop down, select 27- Grants. Click the magnifying glass and select the approver. In Required Action, select Approve. Click Save and Add New to save.

**STEP 7: For all transactions that are NOT interims, add the VP/VPR approval level.**

Select an empty approval level row. From the drop down, select 9- VP/VPR. Click the magnifying glass and select the approver. In Required Action, select Approve. Click Save and Add New to save.

**STEP 8: If needed, add a comment (max 4000 chars):**

**Title:** For secondary jobs, enter the title in the comments section.

**No End Date:** If this additional comp or job has no end date, indicate in the comments section. (Additional processing will be done by HRIS)

**Total Amount to be Paid:** For hourly employees, enter the total amount to be paid. This is a Budget requirement.

Click Save when done.

**STEP 9: Submit the ePAF**

Click the Submit button. Once submitted successfully, the Transaction Status will be Pending. The ePAF will now move through the approval workflow.
Reinstate Job or Compensation (Salaried and Hourly)

This ePAF is used to reinstate a previous job or compensation payment to an employee. This includes supplemental income, overages, bonuses, one-time payments or secondary jobs. This ePAF is for Salaried and Hourly employees except for Executive, Student, Union employees and can only be used if the employee is currently holding a job at the college. This ePAF also cannot be used for employee reimbursements that are greater than 90 days.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td><img src="image1" alt="Image" /></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field (‘T’ in TCID in caps).</td>
<td><img src="image2" alt="Image" /></td>
</tr>
<tr>
<td>In the query date field, enter the effective date of the new job.</td>
<td><img src="image3" alt="Image" /></td>
</tr>
<tr>
<td>Select Reinstate Job or Compensation (Salaried or Hourly) in approval category. Click Go.</td>
<td><img src="image4" alt="Image" /></td>
</tr>
</tbody>
</table>

**STEP 2: Select Position Number**

Click All Jobs. Select the terminated job you want to reinstate for the employee. Click Go.

**STEP 3: Input Begin Record Information.**

Enter the Actual Reinstall Date for the following fields:

- **Job Begin Date**
- **Effective Date**
- **Personnel Date**

**Salary OR Hourly Rate:** Enter either the annualized salary or appointment amount for a Salaried position OR the hourly rate for an Hourly position. Do not use ‘$’ or ‘,’.

Only input ONE pay field.
**Factor and Pays:** This will be the same number. You will input the number of paychecks you would like the employee to receive for the appointment. You can count the number of paychecks by using the begin and end dates of the appointment. Refer to the payroll calendar for guidance.

If the job is a year or longer OR has no end date then enter 24 for semi-monthly, 26 for bi-weekly & 52 for weekly employees. For an academic year (Sept – May), input 18.

**Supervisor:** Enter Supervisor TC ID/UNI in ALL CAPS. For Faculty payments, use the Dept. Chair.

**Job Change Reason:** Update Job Change Reason depending on the type of transaction:
- **SUP** if a Supplemental Income, Overage OR Bonus
- **OTP** if a One Time Payment
- **ADL** if Additional/New Secondary Job

**STEP 4: Input the funding allocation.**

The Effective Date should be after the employee’s last paid date. Ensure the total funding percent is 100%.

**STEP 5: Input End Record Information**

Enter the end date of the job in both the Effective Date and Personnel Date fields. If the Job has no end date, enter 12/31/2027 and indicate no end date in the Comments section.
STEP 6: Input Routing Queue.
Click on the magnifying glass to specify the approver for each of the approval levels.

If this transaction needs to go through Budget AND Grants approval, enter the budget approver in level 24 – (CONTR) Budget/Grant and go to step 6A. Otherwise, click Save and Add New Rows and go to Step 7.

STEP 6A: Include Budget AND Grants as approvers in routing queue.
Select an empty approval level row. From the drop down, select 27-Grants. Click the magnifying glass and select the approver. In Required Action, select Approve. Click Save and Add New Rows.

STEP 7: If needed, add a comment (max 4000 chars).
Title: For secondary jobs, enter the title in the comments section.

No End Date: If this additional comp or job has no end date, indicate in the comments section. (Additional processing will be done by HRIS)

Total Amount to be Paid: For hourly employees, enter the total amount to be paid. This is a Budget requirement.
Click Save when done.

STEP 8: Submit the ePAF.
Click the Submit button. Once submitted successfully, the Transaction Status will be Pending. This indicates that the ePAF is now moving through the approval workflow.
Additional Job – Salaried Student

This ePAF is used to process additional job for Salaried student employees. The employee must have an active employment record in order to use this ePAF.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field. Reminder: You must enter an upper case ‘T’ in the TC ID.</td>
<td><img src="image" alt="Image of ESS New EAPF Person Selection" /></td>
</tr>
<tr>
<td>Enter the Query Date. The Query Date should equal the appointment effective date.</td>
<td><img src="image" alt="Image of ESS Employee Job Assignments" /></td>
</tr>
<tr>
<td>Select Additional Job – Salaried Student on the approval category and click Go.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Select Job</strong></td>
<td></td>
</tr>
<tr>
<td>Click All Jobs to see a listing of all jobs that employee has held.</td>
<td><img src="image" alt="Image of ESS New EAPF Job Selection" /></td>
</tr>
<tr>
<td>For guidance on the Position number to use for an additional student job, refer to Determining a Position Number for a Pooled Position for a Part Time Employee user guide</td>
<td></td>
</tr>
<tr>
<td>The Position Number should not have ever existed for the employee. This can be checked under “All Jobs”.</td>
<td></td>
</tr>
<tr>
<td>If Position Number has not existed for this employee, enter the Position Number and Suffix 00 for this ePAF.</td>
<td></td>
</tr>
<tr>
<td>If Position Number already exists for this employee for a Terminated Job, use the designated student</td>
<td></td>
</tr>
</tbody>
</table>
reappointment ePAf. Please refer to Chapter 2 of the Epaf Manual.

If Position Number already exists for this employee for an Active job, increment the Suffix (i.e. from 00 to 01) for this ePAF.

Click Go to navigate to Electronic Personnel Action Form page.

**STEP 3: Input Begin Record Information.**

Enter the Actual Start Date for the following fields:
- Job Begin Date
- Effective Date
- Personnel Date

Enter the Timesheet Orgn. This is the same as the organization value.

Enter the salary amount for the job. This field should not contain the following: dollar signs or commas. Enter only the numerical amount.

Enter Supervisor TC ID/UNI in ALL CAPS.

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Input the Factor and Pays

Factor and Pays will be the same number. Input the number of paychecks you would like the employee to receive for the appointment. You can count the number of paychecks by using the begin and end dates of the appointment. Refer to the payroll calendar for guidance.

STEP 4: If applicable, update the Funding Allocation field.

The Effective Date should match the begin date. This can only occur after the last paid date.

Ensure the percentage is equal to 100.

STEP 5: Input End Record Information

Enter the Job End Effective Date and Personnel Date.

The Personnel Date should reflect the actual end date.

STEP 6: Input Routing Queue.

Click on the magnifying glass to specify the approver for each approval level.

If your transaction needs to go through both the Budget AND Grants departments for approval, enter the budget approver in level 24 – CONTR Budget/Grant. Then, move on to step 6A

If the position is for an RA/TA/DRF, Financial Aid must be added to the Routing Queue.

Otherwise, click Save and Add New. Move to Step 7.
**Step 6A: Include Budget AND Grants as approvers in routing queue**

Select an empty approval level row. From the drop down, select 27 - Grants. Click the magnifying glass and select the approver. In Required Action, select Approve from the dropdown menu. Click Save and Add New to save.

Note:
For RAs, TAs or DRFS, if the funding index begins with a “2” and “119226”, the Provost level approver must be added.

For RAs, TAs or DRFS if the funding index begins with a “5”, the OSP level approver must be added.

**STEP 7: If needed, add a comment (max 4000 chars).**

Enter any applicable comments regarding the job in this section, if needed.

**STEP 8: Submit the ePAF.**

Click the Submit button.

Once submitted successfully, the Transaction Status will be Pending. The ePAF will now go through the approval workflow.
### Additional Job – College Work Study (CWS)

This ePAF is used to process an additional CWS job for CWS employees. The employee must have an active employment record in order to use this ePAF.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td><img src="#" alt="Image" /></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field. Reminder: You must enter an upper case ‘T’ in the TC ID.</td>
<td><img src="#" alt="Image" /></td>
</tr>
<tr>
<td>Enter the Query Date. <strong>The Query Date should equal the appointment effective date.</strong></td>
<td><img src="#" alt="Image" /></td>
</tr>
<tr>
<td>Select Additional Job – College Work Study. Click Go</td>
<td><img src="#" alt="Image" /></td>
</tr>
</tbody>
</table>

**STEP 2: Select Job**

Click All Jobs to see a listing of all jobs that employee has held.

Next to the Type “New Job”, enter the Work Study Position Number (999999).

**Note:** If Position number already exists for this employee, increment the suffix (i.e. from 00 to 01) for this EPAF.

Click Go to navigate to Electronic Personnel Action Form page.
STEP 3: Input Begin Record Information.

Enter the Actual Start Date for the following fields:
- Job Begin Date
- Effective Date
- Personnel Date

Enter the Timesheet Orgn. This is the same as the organization field in the Funding Allocation section. Input the index the transaction is being charged to and click default from index.

Enter Supervisor TC ID/UNI in ALL CAPS.
Enter the hourly rate in the Hourly Rate field. Do not use ‘$’ or ‘,’.

STEP 4: If applicable, update the Funding Allocation field.

The Effective Date can only occur after the last paid date and should be the same as the effective date on the begin record.

Ensure the percentage is equal to 100.

STEP 5: Input End Record Information

Enter the Job End Effective Date and Personnel Date.

The Personnel Date should reflect the actual end date.
**STEP 6: Input Routing Queue.**
Click on the magnifying glass to specify the approver for each approval level.

**STEP 7: If needed, add a comment (max 4000 chars).**
Enter any applicable comments regarding the job in this section, if needed.

**STEP 8: Submit the ePAF.**
Click the Submit button.

Once submitted successfully, the Transaction Status will be Pending. The ePAF will now go through the approval workflow.
Adjustments to Active Jobs

Salary or Hourly Rate Updates

This ePAF is mainly used to update the employee’s salary or hourly rate. It also allows updates to the employee’s funding information, timesheet or leave report approver and job title. This can be used for Salaried and Hourly Staff employees only. Executive, Faculty, Union and Interim employees are out of scope for this ePAF.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td><img src="image1" alt="ESS New EPAF Person Selection" /></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field (‘T’ in TC ID in caps).</td>
<td></td>
</tr>
<tr>
<td>In the query date field, enter the effective date of the change. The effective date must be after the employee’s last paid date.</td>
<td></td>
</tr>
<tr>
<td>Select Salary or Rate Update in approval category. Click Go.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Select Position Number</strong></td>
<td><img src="image2" alt="ESS New EPAF Job Selection" /></td>
</tr>
<tr>
<td>Click All Jobs. In the “Select” column, select the job you want to modify the salary or rate for the employee. Click Go.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 3: Input Begin Record Information.</strong></td>
<td><img src="image3" alt="Jump to Bottom" /></td>
</tr>
<tr>
<td>Enter the start date of the additional payment into all three fields <strong>Effective Date</strong> and <strong>Personnel Date</strong> fields. The effective date should be after the last paid date.</td>
<td></td>
</tr>
<tr>
<td>If the start date occurs before the last paid date, input one day after the last paid date the <strong>Effective Date</strong> field. Input the actual day the transaction started in the <strong>Personnel Date</strong> field.</td>
<td></td>
</tr>
</tbody>
</table>
For Salaried positions, enter the new annualized salary or appointment amounts. Do not use ‘$’ or ‘,’.

For Hourly positions, enter the new hourly rate.

Enter Supervisor TCID/UNI in caps.

If the change is for an annual increase, update Job Change Reason to ANN. Otherwise, keep the default ADJ.

**STEP 4: Update the funding allocation, if needed.**

The Effective Date must be after the employee’s last paid date. Ensure the total funding is 100%.

**STEP 6: Input Routing Queue.**

Click on the magnifying glass to specify the approver for each approval level.

If this transaction needs to go through Budget AND Grants approval, enter the budget approver in level 24 – (CONTR) Budget/Grant and go to step 6A. Otherwise, click Save and Add New Rows and go to Step 7.

**STEP 6A: Include Budget AND Grants as approvers in routing queue.**

Select an empty approval level row. From the drop down, select 27- Grants. Click the magnifying glass and select the approver. In Required Action, select Approve. Click Save and Add New Rows.

**STEP 7: If needed, enter comment (max 4000 chars):**

**Title:** If the job title needs to be updated, enter the new title.

**Total Amount:** For hourly employees, enter the total
**amount to be paid.** This is a Budget requirement.

**End Date:** Input the end date of the transactions. This is a Budget requirement.

Insert any additional comments. Click Save when done.

**STEP 8: Submit the ePAF.**

Click the Submit button. Once submitted successfully, the Transaction Status will be Pending.
Salary Adjustment – Faculty/FT Lecturer

This ePAF is used to process a salary adjustment for current Faculty/FT Lecturers by changing their step. The employee must have an active employment record in order to use this ePAF.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field. Reminder: You must enter an upper case ‘T’ in the TC ID.</td>
<td><strong>Query Date:</strong> 03/15/2021</td>
</tr>
<tr>
<td>Enter the Query Date. The Query Date should equal the appointment effective date.</td>
<td><strong>Approval Category:</strong> Salary Adjustment - Faculty/FT Lecturer, MODIB1</td>
</tr>
<tr>
<td>Select Salary Adjustment – Faculty/FT Lecturer</td>
<td><img src="image2.png" alt="Image" /></td>
</tr>
<tr>
<td><strong>STEP 2: Select Job</strong></td>
<td><img src="image3.png" alt="Image" /></td>
</tr>
<tr>
<td>Click All Jobs to see a listing of all jobs that employee has held.</td>
<td><strong>Begin Appointment:</strong> 33910199</td>
</tr>
<tr>
<td>Select the applicable Active FT/Lecturer position number you want to create a salary adjustment ePAF for.</td>
<td><img src="image4.png" alt="Image" /></td>
</tr>
<tr>
<td>Click Go to navigate to Electronic Personnel Action Form page.</td>
<td><strong>Effective Date:</strong> 03/15/2021</td>
</tr>
<tr>
<td><strong>STEP 3: Input Begin Record Information.</strong></td>
<td><img src="image5.png" alt="Image" /></td>
</tr>
<tr>
<td>Input the Effective Date and Personnel date. The Effective date should be after the last paid date. For the Personnel Date, enter the Actual Begin Date of the reappointment.</td>
<td><strong>Personnel Date:</strong> 03/15/2021</td>
</tr>
<tr>
<td>Input the step and rank the employee’s job is changing to.</td>
<td><strong>Step:</strong> 11</td>
</tr>
</tbody>
</table>

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STEP 4: If applicable, update the Funding Allocation field.

The Effective Date can only occur after the last paid date and should equal the effective date on the begin record.

Ensure the percentage is equal to 100.

STEP 5: Input Routing Queue.

Click on the magnifying glass to specify the approver for each approval level.

STEP 6: If needed, add a comment (max 4000 chars).

Enter any applicable comments regarding the job in this section, if needed.

STEP 7: Submit the ePAF.

Click the Submit button.

Once submitted successfully, the Transaction Status will be Pending. The ePAF will now go through the approval workflow.
## Labor Update

This ePAF can be used to update the funding information for all employees except Executive, Student and Interim employees. No additional updates to the job are allowed.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field. Reminder: You must enter an upper case ‘T’ in the TC ID.</td>
<td><img src="image" alt="Image of ePAF parameters" /></td>
</tr>
<tr>
<td>Enter the Query Date. The Query Date should equal the labor update effective date. The effective date should be after the employee’s last paid date.</td>
<td></td>
</tr>
<tr>
<td>Select the Labor Distribution Change approval category and click Go.</td>
<td><img src="image" alt="Image of job selection" /></td>
</tr>
<tr>
<td><strong>STEP 2: Select Job</strong></td>
<td></td>
</tr>
<tr>
<td>Click All Jobs to see a listing of all jobs that employee has held.</td>
<td></td>
</tr>
<tr>
<td>From the list that populates, select the appropriate ACTIVE job. Then click Go to navigate to Electronic Personnel Action Form page.</td>
<td><img src="image" alt="Image of job selection" /></td>
</tr>
</tbody>
</table>
**STEP 3: Input the new funding information.**

Enter the new index. Click Default from Index. This will automatically update the fields in yellow. Enter the correct % breakdown. Note that the total percentage must equal 100. Otherwise, the ePAF will error.

**STEP 4: Input Routing Queue.**

Routing Queue will vary depending on the Approval Category type. Click on the magnifying glass to specify the approver for each approval level.

Click on the Save and Add New Rows or the Save button to save.

**STEP 4A: Include Budget AND Grants as approvers in routing queue.**

Select an empty approval level row. From the drop down, select 27- Grants. Click the magnifying glass and select the approver. In Required Action, select Approve. Click Save and Add New Rows.

**STEP 5: If needed, add a comment (max 4000 chars).**

If the labor adjustment has an end date different from what is on the current job record, please indicate. Click Save.

**STEP 8: Submit the ePAF.**

Click the Submit button.

Once submitted successfully, the Transaction Status will be Pending. The ePAF will now go through the approval workflow.
| **Name and ID:** | 110873 |
| **Job and Suffix:** | 202673-00, Local Staff Developer |
| **Transaction:** | 110873 |
| **Job and Suffix:** | 202673-00, Local Staff Developer |
| **Transaction Status:** | Pending |
| **Approval Category:** | Labor Distribution Change, MODJB2 |
| **Last Paid Date:** | 06/20/20 |
| **Query Date:** | 10/01/20 |
Hourly Rate or Labor Update - Interim

This ePAF can only be used to update the hourly rate and the funding information of an employee who is currently holding an interim job. The interim job should be Active.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field ('T' in upper case).</td>
<td></td>
</tr>
<tr>
<td>In the query date field, enter the effective date of the change. The effective date should be after the employee’s last paid date.</td>
<td></td>
</tr>
<tr>
<td>Select Hourly Rate or Labor Update – Interim for the approval category and click Go.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Select Position Number</strong></td>
<td><img src="image2.png" alt="Image" /></td>
</tr>
<tr>
<td>Select All Jobs. In the “Select” column, select the active job you want to modify the hourly rate or the labor/funding information. Click “Go”.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 3: Input Begin Record Information.</strong></td>
<td><img src="image3.png" alt="Image" /></td>
</tr>
<tr>
<td>Enter the appropriate Effective Date and Personnel Date of the hourly rate or labor update. The effective date should be after the employee’s last paid date.</td>
<td></td>
</tr>
<tr>
<td>To update the employee’s current hourly rate, enter the new hourly rate in the Hourly Rate field. Otherwise, leave blank. Do not use ‘$’ or ‘,’.</td>
<td></td>
</tr>
</tbody>
</table>
**STEP 4: If applicable, update the funding section**

To update the labor distribution for the employee’s job, update the fields in the Funding Allocation section. Ensure the funding percent equals 100%.

**STEP 6: Input Routing Queue.**

Click on the magnifying glass to enter the approver for each approval level. Click Save and Add New to save.

**STEP 6A: Include Budget AND Grants as approvers in routing queue (if both need to approve).**

Select an empty approval level row. From the drop down, select 27 - Grants. Click the magnifying glass and select the approver. In Required Action, select Approve from the dropdown menu. Click Save and Add New to save.

**STEP 7: Add a comment (max 4000 chars).**

If updating the hourly rate, enter the total amount in the Comment box. This is required by the Budget department. You may also enter additional comments if needed. Click Save when done.

**STEP 8: Submit the ePAF.**

Click the Submit button. Once submitted successfully, the Transaction Status will be Pending. This indicates that the ePAF is now moving through the approval workflow.
Hourly Rate or Labor Updates – Work Study

This ePAF allows updates to hourly rates or labor information on a College Work Study (CWS) appointment. This is specific to CWS appointments only as the approval workflow goes through Financial Aid.

### What you need to do

<table>
<thead>
<tr>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field. Reminder: You must enter an upper case ‘T’ in the TC ID.</td>
</tr>
<tr>
<td>In the query date field, enter the <strong>effective date of this transaction</strong>. The effective date should be after the employee’s last paid date.</td>
</tr>
<tr>
<td>Select Hourly Rate or Labor Update – Work Study for the approval category and click Go.</td>
</tr>
<tr>
<td><strong>STEP 2: Select Position Number</strong></td>
</tr>
<tr>
<td>Select All Jobs. In the “Select” column, select the active work study job you want to modify the hourly rate or labor information. Click “Go”.</td>
</tr>
<tr>
<td><strong>STEP 3: Input Begin Record Information.</strong></td>
</tr>
<tr>
<td>Enter the appropriate Effective Date and Personnel Date of the hourly rate or labor update. The effective date should be after the employee’s last paid date.</td>
</tr>
<tr>
<td>If you want to make an update to the employee’s current hourly rate, enter the new hourly rate in the Hourly Rate field. Otherwise, leave blank. Do not use ‘$’ or ′,’.</td>
</tr>
</tbody>
</table>
STEP 4: If applicable, update the funding section

If you want to use this ePAF to update the labor distribution for the employee’s job, update the fields in the Funding Allocation section.

Ensure the funding percent equals 100%

STEP 6: Input Routing Queue.

Once all applicable fields have been filled out, update the routing queue.

Routing Queue will vary depending on ePAF type. Click on the magnifying glass to enter the approver for each approval level. Click Save and Add New Rows to save.

STEP 7: Add a comment (max 4000 chars).

Enter the total amount for this ePAF in the Comments box. This is required by the Budget department. You may also enter additional comments if needed.

Click Save when done.

STEP 8: Submit the ePAF.

Click the Submit button.

Once submitted successfully, the Transaction Status will be Pending. This indicates that the ePAF is now moving through the approval workflow.
# Timesheet/Leave Report Approver and/or Title Updates

This ePAF can be used to update the timesheet/leave report approver and/or the job title for an active job record.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td><strong>What you will see</strong></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field. Reminder: You must enter an upper case ‘T’ in the TC ID.</td>
<td><img src="image1.png" alt="Image showing how to enter TCID" /></td>
</tr>
<tr>
<td>Enter the Query Date. The Query Date should equal the effective date of the change. The effective date should be after the employee’s last paid date.</td>
<td><img src="image2.png" alt="Image showing the query date entry" /></td>
</tr>
<tr>
<td>Select the Timesheet/Leave Approver or Title Update approval category and click Go.</td>
<td><img src="image3.png" alt="Image showing the approval category selection" /></td>
</tr>
</tbody>
</table>

**STEP 2: Select the position that needs the update**

Select the applicable active job.

Click Go to navigate to the Electronic Personnel Action Form page.
STEP 3: Input the data adjustment information.

Enter the effective date of the change in the Effective Date field. The effective date should be after the employee’s last paid date.

If updating the Timesheet/Leave Report approver, enter the supervisor TC ID/UNI in all CAPS. (If not updating this information, leave field blank.)

STEP 4: If applicable, input title in the comments section (max 4000 chars).

If updating the title, specify in the comments section.

Click Save.

STEP 5: Update the Job Change Reason Code.

This will default to SUPER to indicate a timesheet/leave report approver update. This only needs to be updated if you are only adjusting the title. If you are only adjusting the title, update the job change reason to TITLE.

STEP 4: Input the Approvers in the Routing Queue.

Click on the magnifying glass to enter the approver for each approval level.

For any Faculty or Lecturer updates, please select Iraida Torres- Iziarry as the DEPT level approver.

Click on the Save and Add New Rows or the Save button to save.
STEP 8: Submit the ePAF.

Click the Submit button.

Once submitted successfully, the Transaction Status will be Pending. The ePAF will now go through the approval workflow.
Job Termination

A termination EPAF is submitted when the employee will no longer work in the job. You are not moving the employee to work in another job in your department nor another job at the College.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the EPAF parameters:</strong></td>
<td></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field. Reminder: You must enter an upper case ‘T’ in the TC ID.</td>
<td>![Image of EPAF form with TCID and Query Date fields highlighted]</td>
</tr>
<tr>
<td>Enter the Query Date. The Query Date should equal the job termination date.</td>
<td>![Image of EPAF form with Query Date field highlighted]</td>
</tr>
<tr>
<td>Select the approval category Job Termination and click Go.</td>
<td>![Image of EPAF form with Job Termination approval category highlighted]</td>
</tr>
</tbody>
</table>

**STEP 2: Select Job to be Terminated**

Click All Jobs to see a listing of all jobs that employee has held.

From the list that populates, select the active job that you want to terminate. Then click Go.
**STEP 3: Input Job End Date information.**

To input a termination date in the future: Enter the job termination date into BOTH the Effective Date and Personnel Date fields.

To input a termination date in the past: The date fields will differ. In the Effective Date field, enter the same date as the Last Paid Date. (The system will not allow the effective date to occur after the last paid date.)

In the Personnel Date field, enter the actual last day of work.

**STEP 4: Input the Approvers in the Routing Queue.**

Click on the magnifying glass to enter the approver for each approval level. Click on the Save and Add New Rows or the Save button to save.

**STEP 7: Input reason for termination.**

In the comments section, write the reason for termination of job. Click Save.

**STEP 8: Submit the ePAF.**

Click the Submit button.

Once submitted successfully, the Transaction Status will move from Waiting to Pending. The ePAF will now move through the approval workflow.
Job Termination for Transfers

This ePAF will terminate a job with the intent to transfer the employee to another job at the College. Please note that a separate follow up transaction (either via ePAF or PageUp) will have to be submitted in order to move the employee into the new job.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td><img src="https://example.com/image1.png" alt="Image" /></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field. Reminder: You must enter an upper case ‘T’ in the TC ID.</td>
<td><img src="https://example.com/image2.png" alt="Image" /></td>
</tr>
<tr>
<td>Enter the Query Date. The Query Date should equal the effective date of the job transfer.</td>
<td><img src="https://example.com/image3.png" alt="Image" /></td>
</tr>
<tr>
<td>Select the Job Termination for Transfer approval category and click Go.</td>
<td><img src="https://example.com/image4.png" alt="Image" /></td>
</tr>
</tbody>
</table>

| **STEP 2: Select the job that the employee will be transferring from.** | ![Image](https://example.com/image5.png) |
| Click Go to navigate to Electronic Personnel Action Form page. | |

| **STEP 3: Input Job End Date information.** | ![Image](https://example.com/image6.png) |
| To input a termination date in the future: Enter the termination date of the job into BOTH the Effective Date and Personnel Date fields. | ![Image](https://example.com/image7.png) |
| To input a termination date in the past: The date fields will differ. In the Effective Date field, enter the same date as the Last Paid Date. (The system will not allow the effective date to occur after the last paid date.) In the Personnel Date field, enter the actual last day of work. | ![Image](https://example.com/image8.png) |
### STEP 4: Input Routing Queue.

Routing Queue will vary depending on ePAF type. Click on the magnifying glass to enter the approver for each approval level.

Click Save and Add New to save.

### STEP 5: Submit the ePAF.

Click the Submit button. Once submitted successfully, the Transaction Status will be Pending. The ePAF will now move through the approval workflow.
College Work Study Transfer to Interim

This ePAF will transfer a College Work Study (CWS) to an Interim employee. This usually occurs when CWS funding runs out and the department would like to keep them on as an employee.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field. You must enter an upper case ‘T’ in the TC ID.</td>
<td></td>
</tr>
<tr>
<td>In the query date field, enter the effective date of the transfer.</td>
<td></td>
</tr>
<tr>
<td>Select College Work Study Transfer to Interim on the approval category and click Go.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Select Position Number</strong></td>
<td></td>
</tr>
<tr>
<td>Select All Jobs. In the “Select” column.</td>
<td></td>
</tr>
<tr>
<td>Input the interim position number you want to transfer the work study position to. Click “Go”.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 3: Input Begin Record Information.</strong></td>
<td></td>
</tr>
<tr>
<td>Specify the Contract Type. Contract type is Primary if the new interim position is the only job for the employee. Otherwise, contract type is Secondary.</td>
<td></td>
</tr>
<tr>
<td>Enter the Job Begin Date, Effective Date and Personnel Date of the interim transfer position. The effective date should be after the employee’s last paid date.</td>
<td></td>
</tr>
</tbody>
</table>
Enter the new hourly rate in the Hourly Rate field. Do not use ‘$’ or ‘,’.

Enter the index from the funding source in the Timesheet Orgn field. If there are multiple indices, please select the index with the highest percentage.

Enter the Supervisor TC ID or UNI (in caps).

STEP 4: If applicable, update the funding section

Ensure the funding allocation section is updated with the appropriate index/account.

The effective date for this section should be the same as the Job Effective Date. **Ensure the funding percent equals 100%**

STEP 6: Input Routing Queue.

Once all applicable fields have been filled out, update the routing queue. Click on the magnifying glass to enter the approver for each of the approval level. Click Save and Add New to save.

STEP 7: If needed, add a comment.

Enter the total amount in the Comments box. This is a Budget department requirement. You may also enter other comments if needed. Click Save when done.
STEP 8: Submit the ePAF.

Click the Submit button. Once submitted successfully, the Transaction Status will be Pending. This indicates that the ePAF is now moving through the approval workflow.

Reappt – College Work Study

This ePAF is used to reappoint College Work Study employees paid from account 7829. The employee must have an active employment record AND must be returning to the same appointment that is (or will be) terminated by the begin date of the new reappointment.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field. Reminder: You must enter an upper case ‘T’ in the TC ID.</td>
<td></td>
</tr>
<tr>
<td>Enter the Query Date. The Query Date should equal the appointment effective date.</td>
<td></td>
</tr>
<tr>
<td>Select Reappt – College Work Study approval category. Click Go</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Select Job</strong></td>
<td></td>
</tr>
<tr>
<td>Click All Jobs to see a listing of all jobs that employee has held.</td>
<td></td>
</tr>
<tr>
<td>From the list that populates, select the terminated job that needs to be reappointed. Click Go to navigate to Electronic Personnel Action Form page.</td>
<td></td>
</tr>
</tbody>
</table>
**STEP 3: Input Begin Record Information.**

In the Personnel Date, enter the Actual Begin Date of the reappointment.

Enter the hourly rate in the Hourly Rate field. Do not use ‘$’ or ‘,’.

Enter Supervisor TC ID/UNI in ALL CAPS.

Enter the Timesheet Orgn. This is the same as the index in the Funding Allocation section. If there are multiple indices, select the one with the highest %.

**STEP 4: If applicable, update the Funding Allocation field.**

The Effective Date can only occur after the last paid date

Ensure the percentage is equal to 100.

**STEP 6: Input Routing Queue.**

Click on the magnifying glass to specify the approver for each approval level.

**STEP 7: If needed, add a comment (max 4000 chars).**

Enter any applicable comments regarding the job in this section, if needed.

**STEP 8: Submit the ePAF.**

Click the Submit button.
Reappointments

Reappt – Sem Based, Community Teacher

This ePAF is used to reappoint Part Time instructional staff paid from account 6142 or 6149. The employee must have an active employment record AND must be returning to the same appointment that is (or will be) terminated by the begin date of the new reappointment.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field ('T' in TCID in caps).</td>
<td></td>
</tr>
<tr>
<td>Enter the Query Date. The Query Date should equal the appointment effective date.</td>
<td></td>
</tr>
<tr>
<td>Select Reappt – Sem Based, Community Teacher in the approval category. Click Go.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Select Job</strong></td>
<td></td>
</tr>
<tr>
<td>Click All Jobs to see a listing of all jobs that employee has held.</td>
<td></td>
</tr>
<tr>
<td>Select the job/position to be reappointed. Click Go to navigate to the Electronic Personnel Action Form page.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 3: Input Begin Record Information.</strong></td>
<td></td>
</tr>
</tbody>
</table>

Once submitted successfully, the Transaction Status will be Pending. The ePAF will now go through the approval workflow.
Enter the appointment salary in the Salary field. Do not use ‘$’ or ‘,’. The Effective Date is hardcoded and aligns with the start of the semester.
Enter the actual start date of the reappointment in Personnel Date.
Enter Supervisor TCID/UNI in caps.

**STEP 4: For Grant Funded Reappointments only, if necessary, update Labor Distribution information.**
The Effective Date can only occur after the last paid date.

**STEP 5: Input End Record Information**
The Effective Date is hardcoded and aligns with the end of the semester.
In the Personnel Date, enter the actual end date of the reappointment.

**STEP 6: Input Routing Queue.**
Click on the magnifying glass to specify the approver for each approval level.
If this transaction needs both Budget AND Grants approval, enter the budget approver in level 24 – (CONTR) Budget/Grant then go to step 6A. Otherwise, click Save and Add New and go to Step 7.
STEP 6A: Include Budget AND Grants as approvers in routing queue.

Select an empty approval level row. From the drop down, select 27- Grants. Click the magnifying glass and select the approver. In Required Action, select Approve. Click Save and Add New to save.

STEP 7: If needed, add a comment (max 4000 chars).

Enter additional information in the Comment section if needed.

STEP 8: Submit the ePAF.

Click the Submit button. Once submitted successfully, the Transaction Status will be Pending. The ePAF will now go through the approval workflow.
Reappt – Sem. Based, Course Assistant

This ePAF is used to reappoint Student employees paid from account 6462 or 6469. The employee must have an active employment record AND must be returning to the same appointment that is (or will be) terminated by the begin date of the new reappointment.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| **STEP 1: Provide the ePAF parameters:** | ![Image](image1)
| Enter the TCID of the employee in the ID field (‘T’ in TCID in caps). | ![Image](image2)
| Enter the Query Date. **The Query Date should equal the appointment effective date.** | ![Image](image3)
| Select Reappt – Sem Based, Course Assistant in approval category. Click Go. | ![Image](image4)

**STEP 2: Select Job**

Click All Jobs to see a listing of all jobs that employee has held.

Select the appropriate job to be reappointed. Click Go to navigate to Electronic Personnel Action Form page.
STEP 3: Input Begin Record Information.

Enter the appointment salary in the Salary field. Do not use ‘$’ or ‘,’. The Effective Date is hardcoded and aligns with the start of the semester. In the Personnel Date, enter the actual begin date of the reappointment.

Enter Supervisor TC ID/UNI in ALL CAPS.

STEP 4: For Grant Funded Reappointments only, if necessary, update Labor Distribution information.

The Effective Date can only occur after the employee’s last paid date.

STEP 5: Input End Record Information

The Effective Date is hardcoded and aligns with the end of the semester. In the Personnel Date, enter the actual end date of the reappointment.

STEP 6: Input Routing Queue.

Click on the magnifying glass to enter the approver for each approval level.

If this ePAF need both Budget AND Grants approval, enter the budget approver in level 24—(CONTR) Budget/Grant then go to step 6A. Otherwise click Save and Add New and go to Step 7.

STEP 6A: Include Budget AND Grants as approvers in routing queue.

Select an empty approval level row. From the drop down, select...
27- Grants. Click the magnifying glass and select the approver. In Required Action, select Approve. Click Save and Add New to save.

**STEP 7:** If needed, add a comment (max 4000 chars). Enter additional information in the Comment field if needed.

**STEP 8:** Submit the ePAF. Click the Submit button. Once submitted successfully, the Transaction Status will be Pending. The ePAF will now go through the approval process.
Reappt – Sem. Based. RA/TA

This ePAF is used to reappoint student employees paid from account 6422 or 6429. The employee must have an active employment record AND must be returning to the same appointment that is (or will be) terminated by the begin date of the new reappointment.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field (‘T’ in TCID in CAPS)</td>
<td></td>
</tr>
<tr>
<td>Enter the Query Date. The Query Date should be the appointment effective date.</td>
<td></td>
</tr>
<tr>
<td>Select Reappt-Sem Based, RA/TA approval category. Click Go.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Select Job</strong></td>
<td></td>
</tr>
<tr>
<td>Click All Jobs to see a listing of all jobs that employee has held.</td>
<td></td>
</tr>
<tr>
<td>From the list, select the appropriate terminated job. Click Go to navigate to Electronic Personnel Action Form page.</td>
<td></td>
</tr>
</tbody>
</table>
STEP 3: Input Begin Record Information.
Enter the appointment salary in the Salary field. Do not use ‘$’ or ‘,’.
The Effective Date is hardcoded and aligns with the start of the semester.
Enter the actual begin date of the reappointment in the Personnel Date.
Enter Supervisor TCID/UNI (caps).

STEP 4: For Grant Funded Reappointments only, if necessary, update Labor Distribution information.
The Effective Date can only occur after the employee’s last paid date.

STEP 5: Input End Record Information
The Effective Date is hard coded and aligns with the end of the semester.
Enter the actual end date of the reappointment in the Personnel End Date.

STEP 6: Input Routing Queue.
Click on the magnifying glass to enter the approver for each approval level.
If this ePAF needs to go through both Budget AND Grants approval, enter the budget approver in level 24 – (CONTR) Budget/Grant then go to step 6A. Otherwise, click Save and Add New Rows and go to Step 7.

STEP 6A: Include Budget AND Grants as approvers in routing queue.
Select an empty approval level row. From the drop down, select 27-Grants. Click the magnifying glass and select the approver. In Required Action, select Approve. Click Save and Add New to save.

**STEP 7: If needed, add a comment (max 4000 chars).**
Enter any applicable comments regarding the job.

**STEP 8: Submit the ePAF.**
Click the Submit button. Once submitted successfully, the Transaction Status will be Pending. The ePAF will now go through the approval workflow.
Reappt. – Sem. Based, PT Instructional

This ePAF is used to reappoint employees who are Part Time Instructors that paid from account 6122/6129, 6132/6139, 6152/6159 (e-classes 31, 35, 81). The employee must have an active employment record AND must be returning to the same appointment that is (or will be) terminated by the begin date of the new reappointment.

What you need to do | What you will see
--- | ---
**STEP 1: Provide the ePAF parameters:**
Enter the TCID of the employee in the ID field (‘T’ in TCID in caps).
Enter the Query Date. The Query Date should equal the appointment effective date.
Select Reappt - Sem Based, PT Instructional in approval category. Click Go.

**STEP 2: Select Job**
Click All Jobs to see a listing of all jobs that employee has held.
Select the appropriate job that needs to be reappointed. Click Go to navigate to Electronic Personnel Action Form page.
**STEP 3: Input Begin Record Information.**

Enter the appointment salary in the Salary field. Do not use ‘$’ or ‘,’.

The Effective Date is hardcoded and aligns with the start of the semester. In the Personnel Date, enter the actual begin date of the reappointment.

Enter Supervisor TCID/UNI (caps).

**STEP 4: For Grant Funded Reappointments only, if necessary, update Labor Distribution information.**

The Effective Date can only occur after the employee’s last paid date.

**STEP 5: Input End Record Information**

The Effective Date is hardcoded and aligns with the end of the semester.

In the Personnel Date, enter the actual end date of the reappointment.

**STEP 6: Input Routing Queue.**

Click on the magnifying glass to enter the approver for each approval level.

If this transaction needs both Budget AND Grants approval, enter the budget approver in level 24 – (CONTR) Budget/Grant then go to step 6A. Otherwise, click Save and Add New Rows and go to Step 7.
### STEP 6A: Include both Budget AND Grants as approvers in routing queue.

Select an empty approval level row. From the dropdown, select 27- Grants. Click the magnifying glass and select the approver. In Required Action, select Approve. Click Save and Add New Rows.

### STEP 7: If needed, add a comment (max 4000 chars).

Enter additional information in the Comment if needed.

### STEP 8: Submit the ePAF.

Click the Submit button. Once submitted successfully, the Transaction Status will be Pending. The ePAF will now go through the approval workflow.
Reappt. – Summer A, FT Faculty

This ePAF is used by the Vice Provost’s office to appointment Faculty to teach for Summer Session A. This ePAF will be made available in conjunction with the dates of Summer Session A.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field (‘T’ in TCID in caps).</td>
<td></td>
</tr>
<tr>
<td>Enter the Query Date. <strong>The Query Date should equal the appointment effective date.</strong></td>
<td></td>
</tr>
<tr>
<td>Select Reappt – Summer A, FT Faculty in approval category.</td>
<td></td>
</tr>
<tr>
<td><strong>Click Go.</strong></td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Select Job</strong></td>
<td></td>
</tr>
<tr>
<td>Click All Jobs to see a listing of all jobs that employee has held.</td>
<td></td>
</tr>
<tr>
<td>Select the appropriate terminated job to be reappointed. <strong>Click Go to navigate to Electronic Personnel Action Form page.</strong></td>
<td></td>
</tr>
</tbody>
</table>
**STEP 3: Input Begin Record Information.**
Enter the appointment salary in the Salary field. Do not use ‘$’ or ‘,’.
The rest of the fields are hardcoded and not updatable.

**STEP 4: If applicable, update Labor Distribution information.**
The Effective Date can only occur after the employee’s last paid date. Ensure the total is 100%.

**STEP 5: End Record Information**
All fields in this section are hardcoded and not enterable. No action is required.

**STEP 6: Input Routing Queue.**
Click on the magnifying glass to enter the approver for each approval level. Click Save and Add New Rows.

**STEP 7: If needed, add a comment (max 4000 chars).**
Enter any applicable comments regarding the job in this section.

**STEP 8: Submit the ePAF.**
Reappt. – Summer B, FT Faculty

This ePAF is used by the Vice Provost’s office to appointment Faculty to teach for Summer Session B. This ePAF will be made available in conjunction with the dates of Summer Session B.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td>![Image of ESS screen showing New EPAF Person Selection]</td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field ('T' in TCID in caps).</td>
<td></td>
</tr>
<tr>
<td>Enter the Query Date. <strong>The Query Date should equal the appointment effective date.</strong></td>
<td></td>
</tr>
<tr>
<td>Select Reappt – Summer B, FT Faculty in approval category. Click Go.</td>
<td></td>
</tr>
</tbody>
</table>
STEP 2: Select Job
Click All Jobs to see a listing of all jobs that employee has held.
Select the appropriate terminated job to be reappointed. Click Go to navigate to Electronic Personnel Action Form page.

STEP 3: Input Begin Record Information.
Enter the appointment salary in the Salary field. Do not use ‘$’ or ‘,’.
The rest of the fields are hardcoded and not updatable.

STEP 4: If applicable, update Labor Distribution information.
The Effective Date can only occur after the employee’s last paid date. Ensure the funding total is 100%.

STEP 5: End Record Information
All fields in this section are hardcoded and not enterable. No action is required.
**STEP 6: Input Routing Queue.**

Click on the magnifying glass to enter the approver for each approval level. Click Save and Add New Rows.

**STEP 7: If needed, add a comment (max 4000 chars).**

Enter any applicable comments regarding the job in this section.

**STEP 8: Submit the ePAF.**

Click the Submit button. Once submitted successfully, the Transaction Status will be Pending. The ePAF will now move through the approval workflow.
Reappt – Year Round, Doctoral Research Fellow

This ePAF is used to reappoint Doctoral Research Fellows. The employee must have an active employment record AND must be returning to the same appointment that is (or will be) terminated by the begin date of the new reappointment.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td>![Image of ePAF form]</td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field. Reminder: You must enter an upper case ‘T’ in the TC ID.</td>
<td>Enter the TCID of the employee. Enter Query Date. The Query Date should equal the appointment effective date.</td>
</tr>
<tr>
<td>Enter the Query Date.</td>
<td>Select Reappt – Year Round, Doctoral Research Fellow</td>
</tr>
<tr>
<td>Select Reappt – Year Round, Doctoral Research Fellow</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Select Job</strong></td>
<td>![List of jobs]</td>
</tr>
<tr>
<td>Click All Jobs to see a listing of all jobs that employee has held.</td>
<td>Select the Doctoral Research Fellow job you want to reappoint. Click Go to navigate to Electronic Personnel Action Form page.</td>
</tr>
<tr>
<td>Select the Doctoral Research Fellow job you want to reappoint. Click Go to Electronic Personnel Action Form page.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 3: Input Begin Record Information.</strong></td>
<td>![Form with input fields]</td>
</tr>
<tr>
<td>Enter the Actual Reappointment Date for the following fields:</td>
<td>Enter the Actual Reappointment Date for the following fields:</td>
</tr>
<tr>
<td>Effective Date</td>
<td>Effective Date</td>
</tr>
<tr>
<td>Personnel Date</td>
<td>Personnel Date</td>
</tr>
<tr>
<td>Enter Supervisor TC ID/UNI in ALL CAPS.</td>
<td>Enter Supervisor TC ID/UNI in ALL CAPS.</td>
</tr>
<tr>
<td>Enter the salary amount for the appointment.</td>
<td>Enter the salary amount for the appointment.</td>
</tr>
</tbody>
</table>
Enter the factor and pays based on the start and end dates
Note: Factor and Pays = # of pay periods from the start to end date of the appointment.

**STEP 4: If applicable, update the Funding Allocation field.**

The Effective Date can only occur after the last paid date and must match the effective date from the begin appointment record in Step 3.

Ensure the percentage is equal to 100.

**STEP 5: Input End Record Information**

Enter the Job End Effective Date and Personnel Date.

The Personnel Date should reflect the actual end date.

**STEP 6: Input Routing Queue.**

Click on the magnifying glass to specify the approver for each approval level.

Note:
If the funding index begins with a “2” and “119226”, the Provost level approver must be added.

If the funding index begins with a “5”, the OSP level approver must be added.

**STEP 7: If needed, add a comment (max 4000 chars).**

Enter any applicable comments regarding the job in this section, if needed.
STEP 8: Submit the ePAF.

Click the Save button. The transaction status will change to Waiting.

Click the Submit button.

Once submitted successfully, the Transaction Status will be Pending. The ePAF will now go through the approval workflow.
Reappt – Year Round

This ePAF is used to reappoint the following employee groups: FT Faculty and Instructional, FT & PT Professionals, Admin Fellows & Interims. The employee must have an active employment record AND must be returning to the same appointment that is (or will be) terminated by the begin date of the new reappointment.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td><img src="image1.jpg" alt="New EPAF Person Selection" /></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field ('T' in TCID in caps).</td>
<td></td>
</tr>
<tr>
<td>Enter the Query Date. The Query Date should equal the appointment effective date.</td>
<td></td>
</tr>
<tr>
<td>Select Reappt – Year Round in approval category. Click Go.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Select Job</strong></td>
<td><img src="image2.jpg" alt="New EPAF Person Selection" /></td>
</tr>
<tr>
<td>Click All Jobs to see a listing of all jobs that employee has held.</td>
<td></td>
</tr>
<tr>
<td>Select the appropriate terminated job to be reappointed. Click Go to navigate to Electronic Personnel Action Form page.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 3: Input Begin Record Information.</strong></td>
<td><img src="image3.jpg" alt="New EPAF Person Selection" /></td>
</tr>
<tr>
<td>For salaried employee, enter the annual salary. For non-exempt (hourly paid) employee, enter the hourly rate. Do not use '$' or ','.</td>
<td></td>
</tr>
<tr>
<td>Enter the Actual Reappointment Date for the following fields: Effective Date, Personnel Date</td>
<td></td>
</tr>
<tr>
<td>Enter Supervisor TC ID/UNI in all caps.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 4: If necessary, update the funding information.</strong></td>
<td><img src="image4.jpg" alt="New EPAF Person Selection" /></td>
</tr>
</tbody>
</table>

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Last revised: 5-Apr-21
The Effective Date can only occur after the last paid date.

**STEP 5: Input End Record Information**
Enter the end date of the appointment in both Effective Date and Personnel Date.

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Status: (Not Enterable)</td>
<td></td>
<td>T</td>
</tr>
<tr>
<td>Effective Date:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personnel Date:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Change Reason:</td>
<td></td>
<td>(Not Enterable)</td>
</tr>
</tbody>
</table>

**STEP 6: Input Routing Queue.**
Click on the magnifying glass to enter the approver for each approval level.

If this transaction needs both Budget AND Grants approval, enter the budget approver in level 24 – (CONTR) Budget/Grant then go to step 6A. Otherwise, click Save and Add New Rows and go to Step 7.

**STEP 6A: Include Budget AND Grants as approvers in routing queue.**
Select an empty approval level row. From the drop down, select 27- Grants. Click the magnifying glass and select the approver. In Required Action, select Approve. Click Save and Add New Rows.

**STEP 7: If needed, add a comment (max 4000 chars).**
For hourly employees, enter the total amount to be paid for this job. This is a Budget requirement.
Enter any additional information if needed.

**STEP 8: Submit the ePAF.**
Click the Submit button. Once submitted successfully, the Transaction Status will be Pending. The ePAF will now move through the approval workflow.
### Guide to Human Resources Forms & Transactions for Managers & Administrators

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---

<table>
<thead>
<tr>
<th>Name and ID:</th>
<th>Suzanne</th>
<th>TSG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction:</td>
<td>98666</td>
<td></td>
</tr>
<tr>
<td>Transaction Status:</td>
<td>Pending</td>
<td></td>
</tr>
</tbody>
</table>

**Job and Suffix:** N00009-01, Part Time Instructor

**Query Date:** 05/16/19

**Last Paid Date:** 04/15/19
## Faculty Sabbatical Leave

This ePAF is used by the Vice Provost to process Sabbatical Leave for Faculty employees.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td><img src="image" alt="New EAPF Person Selection" /></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field. Reminder: You must enter an upper case ‘T’ in the TC ID.</td>
<td><strong>Enter the TCID:</strong> Enter the TCID in the ID field. Reminder: You must enter an upper case ‘T’ in the TC ID.</td>
</tr>
<tr>
<td>Enter the Query Date. The query date should be after the employee’s last paid date.</td>
<td><img src="image" alt="New EAPF Job Selection" /></td>
</tr>
<tr>
<td>Select the Faculty Sabbatical Leave in approval category. Click Go.</td>
<td><strong>Select the Faculty Sabbatical Leave in approval category. Click Go.</strong></td>
</tr>
<tr>
<td><strong>STEP 2: Select the appropriate job:</strong></td>
<td><img src="image" alt="New EAPF Person Selection" /></td>
</tr>
<tr>
<td>Select the appropriate job you want to apply the ePAF for.</td>
<td><strong>Select the appropriate job you want to apply the ePAF for.</strong> Click Go.</td>
</tr>
<tr>
<td><strong>STEP 3: Input the Sabbatical Begin Date:</strong></td>
<td><img src="image" alt="New EAPF Person Selection" /></td>
</tr>
<tr>
<td>Enter the effective date of the Sabbatical leave. The effective date should be after the employee’s last paid date.</td>
<td><strong>Enter the effective date:</strong> Enter the effective date of the Sabbatical leave. The effective date should be after the employee’s last paid date.</td>
</tr>
<tr>
<td>Enter the actual begin date of the Sabbatical leave in Personnel Date.</td>
<td><strong>Enter the actual begin date:</strong> Enter the actual begin date of the Sabbatical leave in Personnel Date.</td>
</tr>
<tr>
<td>The rest of the fields are hardcoded and cannot be edited.</td>
<td><strong>The rest of the fields are hardcoded and cannot be edited.</strong></td>
</tr>
</tbody>
</table>
**STEP 4: Input the Sabbatical End Date:**

Enter the end date of the Sabbatical leave in the Effective Date and Personnel Date.

The rest of the fields are hardcoded and cannot be edited.

**STEP 5: Input the Routing Queue:**

Using the magnifying glass, select the approver for each approval level.

**STEP 6: If needed, add a comment (max 4000 chars)**

If applicable, add a comment about the ePAF.

**STEP 7: Submit the ePAF**

Click the Submit button.

Once submitted successfully, the transaction status will be Pending. The ePAF will now go through the approval workflow.
**Faculty Return from Sabbatical Leave**

This ePAF is used by the Vice Provost to process Faculty employees returning from Sabbatical Leave.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td><img src="image" alt="New EAP Person Selection" /></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field. Reminder: You must enter an upper case ‘T’ in the TC ID.</td>
<td><strong>New EAP Person Selection</strong></td>
</tr>
<tr>
<td>Enter the Query Date. The query date should be after the employee’s last paid date.</td>
<td><img src="image" alt="Employee Job Assignments" /></td>
</tr>
<tr>
<td>Select the Faculty Sabbatical Return from Leave in approval category. Click Go.</td>
<td><img src="image" alt="Employee Job Assignments" /></td>
</tr>
<tr>
<td><strong>STEP 2: Select the appropriate job:</strong></td>
<td><img src="image" alt="New EAP Job Selection" /></td>
</tr>
<tr>
<td>Select the appropriate job you want to apply the ePAF for.</td>
<td><img src="image" alt="New EAP Job Selection" /></td>
</tr>
<tr>
<td>Click Go.</td>
<td><img src="image" alt="Employee Job Assignments" /></td>
</tr>
<tr>
<td><strong>STEP 3: Input the Return from Sabbatical Begin Date:</strong></td>
<td><img src="image" alt="Employee Job Assignments" /></td>
</tr>
<tr>
<td>Enter the actual begin date of the Return from Sabbatical Leave in Personnel Date.</td>
<td><img src="image" alt="Employee Job Assignments" /></td>
</tr>
<tr>
<td>Enter the effective date of the Return from Sabbatical Leave in Effective Date. The effective date should be after the employee’s last paid date.</td>
<td><img src="image" alt="Employee Job Assignments" /></td>
</tr>
<tr>
<td>The rest of the fields are hardcoded and cannot be edited.</td>
<td><img src="image" alt="Employee Job Assignments" /></td>
</tr>
</tbody>
</table>
### STEP 5: Input the Routing Queue:

Using the magnifying glass, select the approver for each approval level.

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>00 - (TRAVEL) Budget</td>
<td>ANDERSON</td>
</tr>
<tr>
<td>01 - (14225) HRS Apply</td>
<td></td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
</tr>
<tr>
<td>Not Selected</td>
<td></td>
</tr>
</tbody>
</table>

**Save and Add New Rows**

### STEP 6: If needed, add a comment (max 4000 chars)

If applicable, add a comment about the ePAF.

**Comment**

This ePAF is for a Faculty Return from Sabbatical Leave

### STEP 7: Submit the ePAF

Click the Submit button.

Once submitted successfully, the Transaction Status will be Pending. The ePAF will now go through the approval workflow.
## Grants Funded Labor Update

This ePAF is used by the Grants Department to update Labor Distribution for grant funded jobs.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Provide the ePAF parameters:</strong></td>
<td><img src="image1" alt="New EPAG Person Selection" /></td>
</tr>
<tr>
<td>Enter the TCID of the employee in the ID field (‘T’ in TCID in caps).</td>
<td></td>
</tr>
<tr>
<td>Enter the Query Date. The query date should be after the employee’s last paid date.</td>
<td></td>
</tr>
<tr>
<td>Select the Grants Funding Update in approval category. Click Go.</td>
<td><img src="image2" alt="Employee Job Assignments" /></td>
</tr>
<tr>
<td><strong>STEP 2: Select the appropriate job:</strong></td>
<td><img src="image3" alt="Job Labor Self Apply, LABOR1" /></td>
</tr>
<tr>
<td>Select the appropriate job you want to apply the ePAF for. Click Go.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 3: Update the Labor Distribution:</strong></td>
<td><img src="image4" alt="Job Labor Self Apply, LABOR1" /></td>
</tr>
<tr>
<td>Update the labor distribution section as needed. Ensure the percentage total is equal to 100.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 5: Input the Routing Queue:</strong></td>
<td><img src="image5" alt="Routing Queue" /></td>
</tr>
<tr>
<td>Using the magnifying glass, select the approver for each approval level.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 6: If needed, add a comment (max 4000 chars)</strong></td>
<td><img src="image6" alt="Comment" /></td>
</tr>
<tr>
<td>If applicable, add a comment about the ePAF.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 7: Submit the ePAF</strong></td>
<td><img src="image7" alt="Submit" /></td>
</tr>
<tr>
<td>Click the Submit button. Once submitted successfully, the ePAF will automatically be applied.</td>
<td></td>
</tr>
</tbody>
</table>
Determining Position Numbers

Determining a Position Number for a Supplemental Compensation for Full Time Employee

This report will help you determine which position number to use when you want to provide a full-time employee a supplemental compensation payment (supplemental income, overage, bonus).

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>

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Last revised: 5-Apr-21
STEP 1: Go to the Reports home page
Log into the TC Portal. Click on the Reports tab. Navigate to the Human Resources External Reporting section. Right click on Supplemental Positions for Full Time Employees Report and select open link in new tab. (This will keep your ePAF Home Page intact.)

STEP 2: Input report parameters
Enter the employee’s TCID.

Enter the index where the payment will come from.

Click Execute.

STEP 3: Note position number.
The position number to be used for the ePAF transaction will populate based on the TCID and index.

If more than one position number is on the report, review the information listed in type and comments columns to determine which position to use.

**This listing does not mean the employee has held a job using that position number.

*** If you are having trouble determining the position number, contact Christine Flores (cf2556@tc.edu) in the Budget Office for guidance.

Determining a Position Number for a Pooled Position for a Part Time Employee
This report will help you determine which position number to use when you want to request a transaction for a part time employee on a pooled position. These can be paid from accounts 6122, 6132, 6142, 6152, 6462, 6422, 6442, 6412, 6254 or 6571.

| What you need to do | What you will see |
**STEP 1: Go to the Reports home page**

Log into the TC Portal. Click on the Reports tab. Navigate to the Human Resources External Reporting section. Right click on Supplemental Positions for Full Time Employees Report and select open link in new tab. (This will keep your ePAF Home Page intact.)

**STEP 2: Input report parameters**

Enter the employee’s TCID.

Enter the index where the payment will come from.

Enter the account where the payment will come from. Click Execute.

**STEP 3: Note position number.**

The position number to be used for the ePAF transaction will populate

Make a note of the position number and proceed with the ePAF.

**This listing does not mean the employee has held a job using that position number.**

*** If you are having trouble determining the position number, contact Christine Flores (cf2556@tc.edu) in the Budget Office for guidance.
Chapter 4: Other ePAF Functions

Setting Up a Default Routing Queue

Default Routing Queues allow you to automatically populate approvers in your Routing Queue. You must create a default routing queue for each ePAF approval category.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
</table>
| **STEP 1: Go to the ePAF Home Page.**  
Log into the TC Portal. Click on the Employee Resources tab. Navigate to the Human Resources section. Click on EPAFS (Electronic Personal Action Forms). |  |
| **STEP 2: Select EPAF Originator Summary.** |  |
| **STEP 3: From this home page, select Default Routing Queue.** |  |
| **STEP 4: Select the ePAF Approval Category that you want to set up a default routing queue for.**  
Click Go.  
The appropriate approval queue will automatically populate based on the selected approval category. |  |
| **STEP 5: Select the approver for each line on the approval queue.**  
Click the magnifying glass. Select the approver for each level. Click Save and Add New Rows.  
Moving forward, whenever you use this ePAF approval category, the users will default from your |  |
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 after an EPAF has been submitted.

EPAFs - Returned for Correction

This guide details how to review and update an EPAF transaction that has been returned to you for correction.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1:</strong> You will receive an email notification that indicates an EPAF has been returned for correction.</td>
<td><img src="image" alt="Notification of EPAF" /></td>
</tr>
<tr>
<td>Take note of the transaction number.</td>
<td><img src="image" alt="EPAF Home Page" /></td>
</tr>
<tr>
<td><strong>STEP 2:</strong> Go to the EPAF Home Page.</td>
<td><img src="image" alt="Log into the TC Portal" /></td>
</tr>
<tr>
<td>Log into the TC Portal. Click on the Employee Resources tab. Navigate to the Human Resources section. Click on EPAFS (Electronic Personal Action Forms).</td>
<td><img src="image" alt="Select EPAF Originator Summary" /></td>
</tr>
<tr>
<td><strong>STEP 3:</strong> Select EPAF Originator Summary.</td>
<td><img src="image" alt="EPAF Approver Summary" /></td>
</tr>
</tbody>
</table>
STEP 3: Find the applicable transaction.

Click the Current tab. You will see a list of all transactions that are in your queue for further action.

Find the transaction number from the email and click the hyperlink on the employee’s name.

STEP 4: Review the comments section and take action

The approver who returned the transaction will input a comment explaining why and what they need. Based on this comment, you have the option to Void or Update the EPAF.

Click on Void to delete the EPAF and remove it from your and the approver’s queues.

Click on Update to make changes.

STEP 5: Update, save and submit the EPAF.

Update the necessary fields button. You will be able to make updates to all available fields on the EPAF.

Click Save. Click Submit.

Once submitted successfully, the Transaction Status will move from Returned for Correction to Pending.

**Note: The EPAF will remain in your queue until click Submit**
EPAFS - Pending

This guide provides instructions on how to review and update an ePAF transaction that has been submitted and is in the pending status. While the ePAF is in the approval process, you may realize you need to update or void the transaction.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Go to the ePAF Home Page.</strong></td>
<td><img src="image1.png" alt="Image of ePAF Home Page" /></td>
</tr>
<tr>
<td>Log into the TC Portal. Click on the Employee Resources tab. Navigate to the Human Resources section. Click on EPAFS (Electronic Personal Action Forms).</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Select EPAF Originator Summary.</strong></td>
<td><img src="image2.png" alt="Image of EPAF Originator Summary" /></td>
</tr>
<tr>
<td><strong>STEP 3: Find the applicable transaction.</strong></td>
<td><img src="image3.png" alt="Image of History Tab" /></td>
</tr>
<tr>
<td>Click the History tab. You will see a list of all transactions that you have submitted. You are able to update transactions with the status of Pending. Click on the hyperlink on the employee’s name.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 4: Take action.</strong></td>
<td><img src="image4.png" alt="Image of Transaction Details" /></td>
</tr>
<tr>
<td>You are allowed to do one of the three actions: 1. Return for Correction – enables you to update the ePAF. 2. Void – removes the ePAF from the approval workflow 3. Add Comment – any pending approvers will see this additional comment.</td>
<td></td>
</tr>
<tr>
<td>Click on the action you want to take. The transaction status will update accordingly.</td>
<td></td>
</tr>
</tbody>
</table>
Email Notifications

You will receive an email notification at certain times during the transaction. Emails are sent at the following times:

- Email sent to ePAF Originator when it is Returned for Correction.
- Email sent to an ePAF Approver when a transaction is sitting with them for review.
- Email sent to an ePAF Originator when a transaction is Disapproved.

The emails will always state the following:

- Transaction Status
- Transaction Number
- ePAF Approval Category

Sample Email:

Notification of EPAF

NO REPLY <jm2220@tc.columbia.edu>
to me

Dear Johanna Masbad:

EPAF(s) for your area have been returned for correction. To review them, please log into Employee Self Service (ESS) my.tc.edu.

Transaction Number  Transaction Type

110745  Job Termination for Transfer

This email will tell you what action, if any, you need to take. For example, if you receive the above email you know that you must review the comments in the ePAF and take action. (See the section above – EPAFS – Returned for Correction.)
Chapter 5: EPAF Approvers

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.

Approving an ePAF

As an approver, you have the ability to approve, disapprove, return for correction or acknowledge a transaction.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Go to the ePAF Home Page.</strong></td>
<td><strong>Welcome</strong></td>
</tr>
<tr>
<td>Log into the TC Portal. Click on the Employee Resources tab.</td>
<td><strong>Employee Resources</strong></td>
</tr>
<tr>
<td>Navigate to the Human Resources section. Click on EPAFS (Electronic Personal Action Forms).</td>
<td><strong>Click on EPAFS (Electronic Personal Action Forms).</strong></td>
</tr>
<tr>
<td><strong>STEP 2: Navigate to the EPAF Approver Summary.</strong></td>
<td><strong>EPAF Approver Summary</strong></td>
</tr>
<tr>
<td><strong>STEP 3: You will be taken to the EPAF Approver Summary home page.</strong></td>
<td><strong>EPAF Approver Summary</strong></td>
</tr>
<tr>
<td>You will see a listing of all ePAF transactions that are in your queue for approval.</td>
<td><strong>EPAF Approver Summary</strong></td>
</tr>
</tbody>
</table>

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**STEP 4: Select the transaction you want to review/approve.**

Click the hyperlink on the employee name to review the ePAF.

*Clicking the hyperlink on the Comments/Warnings will only allow you to view the comment and not all the fields on the ePAF.*

**STEP 5: Review ePAF and take action.**

After reviewing the ePAF, you are able to take four actions:

1. Approve – This means you approve the transaction and ePAF will move to the next approver.
2. Disapprove – Voids the transaction and the originator cannot make any updates/corrections.
3. Return for Correction – Additional information is needed which can be corrected by the originator.
4. Add Comment – Approvers can add comments for any action. However, if disapproving or returning for correction, input a reason why.
## Adding an ePAF Approver Proxy

This guide provides instructions on how an ePAF approver can designate someone as his/her proxy.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Go to the ePAF Home Page.</strong></td>
<td><img src="image1.png" alt="Image of ePAF Home Page" /></td>
</tr>
<tr>
<td>Log into the TC Portal. Click on the Employee Resources tab. Navigate to the Human Resources section. Click on EPAFS (Electronic Personal Action Forms).</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2: Navigate to EPAF Proxy Records.</strong></td>
<td><img src="image2.png" alt="Image of EPAF Proxy Records" /></td>
</tr>
<tr>
<td><strong>STEP 3: Select applicable Approval Level.</strong></td>
<td><img src="image3.png" alt="Image of EPAF Proxy Records dropdown" /></td>
</tr>
<tr>
<td>You will see a listing of all approval levels where you are an approver. Select the applicable Approval Level from the dropdown. Click Go.</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 4: Select the proxy.</strong></td>
<td><img src="image4.png" alt="Image of selecting proxy" /></td>
</tr>
<tr>
<td>A drop down menu of names will appear. Select the name of your proxy. Click the box in the Add column. Click Save.</td>
<td></td>
</tr>
</tbody>
</table>
Removing an ePAF Approver Proxy
This guide provides instructions on how an ePAF approver can remove someone as his/her proxy.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1:</strong> Go to the ePAF Home Page.</td>
<td>![Image of ePAF Home Page]</td>
</tr>
<tr>
<td>Log into the TC Portal. Click on the Employee Resources tab. Navigate to the Human Resources section. Click on EPAFS (Electronic Personal Action Forms).</td>
<td></td>
</tr>
<tr>
<td><strong>STEP 2:</strong> Navigate to EPAF Proxy Records.</td>
<td>![Image of EPAF Proxy Records]</td>
</tr>
<tr>
<td><strong>STEP 3:</strong> Select applicable Approval Level.</td>
<td>![Image of Approval Levels]</td>
</tr>
<tr>
<td>You will see a listing of all approval levels where you are an approver. Select the applicable Approval Level from the dropdown. Click Go.</td>
<td></td>
</tr>
</tbody>
</table>
**STEP 4: Select the proxy to remove.**

Under names, you will see a listing of all employees who are listed as your approver proxy. To remove a proxy, select the box in the Remove column and click Save.

The proxy’s name will no longer appear in the listing and will no longer be allowed to approve.

---

**Acting as a Proxy**

If granted access, you can act as a proxy for someone who is an ePAF Approver.

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: Go to the ePAF Home Page.</strong></td>
<td>![Image of ePAF Home Page]</td>
</tr>
<tr>
<td>Log into the TC Portal. Click on the Employee Resources tab. Navigate to the Human Resources section. Click on EPAFS (Electronic Personal Action Forms).</td>
<td></td>
</tr>
</tbody>
</table>

| **STEP 2: Navigate to Act as a Proxy.** | ![Image of Act as a Proxy] |
| | |
STEP 3: Select the approver whom you want to proxy for.

In the Proxy For field, a dropdown listing of all users who you can proxy for will populate. Select a name.

STEP 4: Input search parameters. Input the ePAF submission dates you will need to review. Click Go.

STEP 5: Select transaction to review and approve.

The EPAF Approver Summary for the approver you are a proxy for will populate. Select an employee name to view their ePAF and approve.
## Chapter 6: EPAF Troubleshooting

Below are instructions regarding common errors that result when attempting to submit an EPAF. Errors – Termination/Transfer EPAFs

<table>
<thead>
<tr>
<th>Error</th>
<th>How To Fix the Error</th>
</tr>
</thead>
</table>
| **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** | 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.  
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

<table>
<thead>
<tr>
<th>Error</th>
<th>How To Fix the Error</th>
</tr>
</thead>
</table>
| 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. |
| Effective Date must be greater than Last Paid Date                   | 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). |
| 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. |

Errors – College Work Studies EPAFs

<table>
<thead>
<tr>
<th>Error</th>
<th>How To Fix the Error</th>
</tr>
</thead>
</table>
| 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 |
<p>| 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 |</p>
<table>
<thead>
<tr>
<th>Error Description</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. If the error message table says <em>ERROR</em> 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.</td>
<td>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.</td>
</tr>
<tr>
<td>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.</td>
<td>Invalid Date for Effective Date. Format is MM/DD/YYYY</td>
</tr>
<tr>
<td>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 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.</td>
<td>Invalid value for Hourly Rate. Value entered must be numeric</td>
</tr>
<tr>
<td>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.</td>
<td>Hourly Rate must be filled in for Approval Type</td>
</tr>
</tbody>
</table>
### 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 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.

### 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 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.
3. Update the Supervisor TC ID then click **Save**.
4. When you get confirmation that your change was saved successfully, click the **Submit** button.

### 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
   c. 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. Click the Submit button.
# Job Labor Distribution Errors

<table>
<thead>
<tr>
<th>Error</th>
<th>How To Fix the Error</th>
</tr>
</thead>
</table>
| **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. |
| **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. |
| **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. |
| **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. |
| **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. |
| **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: 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.
| 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. |
| --- | --- |
| 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. |
| 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. |
## Chapter 7: EPAF Transaction Glossary

### Transaction Status and Queue Status Guide

<table>
<thead>
<tr>
<th>Status</th>
<th>Status Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<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>

### Action Buttons Guide

<table>
<thead>
<tr>
<th>Action Buttons/Links</th>
<th>User Type</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<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>
</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>Current</td>
<td>Originator / Approver(s)</td>
<td>Transactions that require your action</td>
</tr>
<tr>
<td>In My Queue</td>
<td>Approver(s)</td>
<td>Transactions that will require your action after predecessor levels have been approved</td>
</tr>
<tr>
<td>History</td>
<td>Originator / Approver(s)</td>
<td>Transactions that you have already taken action on</td>
</tr>
</tbody>
</table>
## Version History

<table>
<thead>
<tr>
<th>Version #</th>
<th>Modified by</th>
<th>Date</th>
<th>Description of Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>V1</td>
<td>SJ/JJ/HM</td>
<td>12/13/2017</td>
<td>Changed ‘Split Funded’ to ‘Budget &amp; Grants’; Included OSP in Approval Level for GRDAPP/GRDAPS</td>
</tr>
<tr>
<td>V2</td>
<td>HM</td>
<td>4/2/2018</td>
<td>Updating ‘Personnel Date’ to “Personnel Date”</td>
</tr>
<tr>
<td>V3</td>
<td>HM</td>
<td>5/23/2018</td>
<td>Adding instructions for REAPP/REAPS</td>
</tr>
<tr>
<td>V4</td>
<td>SJ/JJ/HM</td>
<td>6/6/2018</td>
<td>Finalize REAPP/REAPS</td>
</tr>
<tr>
<td>V5</td>
<td>HM</td>
<td>6/22/2018</td>
<td>Updated Financial Aid approver to Hutto, Katherine</td>
</tr>
<tr>
<td>V6</td>
<td>HM</td>
<td>11/28/2018</td>
<td>Reverting Start/End date to Personnel Date; adding supervisor field to REAPP/REAPS</td>
</tr>
<tr>
<td>V6</td>
<td>HM</td>
<td>11/30/2018</td>
<td>Adding Supervisor field to CAAPT/CAAPTS, CMMTSP/CMMUTY, GRDAPP/GRDAPS, PTIAPP/PTIAPS</td>
</tr>
<tr>
<td>V7</td>
<td>HM</td>
<td>10/29/2019</td>
<td>Removing names of HRIS and Financial Aid Approval levels</td>
</tr>
<tr>
<td>V8</td>
<td>HM</td>
<td>9/16/2020</td>
<td>Complete overhaul in conjunction with Release 2 - 2020; addition of new ePAFs; updating with screenshots</td>
</tr>
</tbody>
</table>