Recommended Steps Before Creating a non-Reappointment ePAF

➢ Determine type of transaction - nature of the work/job
  ○ Determine funding information – permanent budget or budget transfer needed?
  ○ Determine position
  ○ Review all jobs for the employee
  ○ Determine ePAF approval category
Determining Position Numbers

- Available on the myTC portal
Issue 1: One Time Payments (OTP)

➢ Payment for working on a short-term assignment, **typically not exceeding three days** in duration. For example, payment for teaching a workshop, music performance, videography, guest speaking, facilitator fees, etc.

➢ Employees do not need a primary job in order to receive a OTP but they need to have an active employment record. If the person does not have an active employment record, he/she must be hired in PageUp to be paid OTP.

➢ Position: OTP000

➢ May only be paid from account 6571 effective April 1st

➢ **Not Eligible:**
  ○ Faculty and Lecturers (Additional work should be processed as Overage or Supplements)
  ○ Non-exempt employees (Non-exempt staff, Interim staff, Administrative Fellow & College Work Study)
  ○ In general, an employee whose primary job is **non-exempt** cannot be paid a one time payment. Additional work should be reported on their timesheet

*Full Time & Part Time Exempt employees are not excluded from one-time payments, but payments must be in coordination with guidelines for [Additional Employment or Supplements for Full-Time Positions](#)*
Issue 1: One Time Payments (OTP)

➢ Clarification on Part Time instructional work
   ○ eligible for OTP as long as it is charged against a different index than the index of
     their active PT instructor job. For example, Part Time instructor in ORL who is
     teaching for one program (one index) and is receiving a OTP for helping another
     program (different index)
   ○ Instructional Staff/Fee-Based Instructional work (account number 6152/6159;
     eclass 81) should NOT be processed as OTP
     ■ This appointment type should be used for anyone paid to teach a course for
       credit with less than 18 points or a non-credit offering.
     ■ There are 4 sub-categories: non-credit instructor, academic supervisor,
       individual and small group instructor, and TCCS teacher. As always, this
       appointment type is not eligible for tuition remission.
Issue 2: Overages

➢ Overage is paid to Faculty (eclass = 20) and Lecturers (eclass = 25) when they do additional academic/research work. Teaching a workshop, an extra class beyond the 4 course load (5 course load for lecturers), a guest lecture and curriculum work, research work, professional development coaching and other academic-related tasks such as accreditation work are examples of salary that is considered overage.

➢ Anytime, Faculty or Lecturers are receiving additional salary paid from a grant (5-xxxxx) index, the salary is considered overage.

➢ This additional pay can take place any time of the year and must be charged against the same account as the Faculty/Lecturer’s primary job.
To determine the position number, run Supplement Positions for Full Time Employees Report (MyTC > Reports > Human Resources External Reporting) 

Dependent on how it is being funded, select the position number with the correct type:

<table>
<thead>
<tr>
<th>Type</th>
<th>When to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – Temporarily Funded Overage</td>
<td>Use if overage is not part of permanent budget and a temporary budget transfer is needed to fund</td>
</tr>
<tr>
<td>2 – Supplement or Overage (Employee Specific)</td>
<td>Use if supplement applies to the employee named in the comments section. (This is a permanently budgeted position.)</td>
</tr>
<tr>
<td>3 – Supplement or Overage (Non Employee Specific)</td>
<td>Use if the supplement is permanently budgeted in which case a budget transfer is not needed to fund. (This is a permanently budgeted position.)</td>
</tr>
</tbody>
</table>
Supplemental pay is available to Full Time Professional Staff, Faculty and Lecturers, Full Time Instructors for administrative work. For example,

- Professional staff - helping out on a long term project or coverage for a vacant job
  Note: all requests for an additional appointment or supplemental pay must be approved in advance of the work. See Additional Employment or Supplements for Full-Time Positions
- Faculty/lecturer - additional administrative work such as running a program like SPA

To determine the position number, for Professional Staff

- run Supplement Positions for Full Time Employees Report (MyTC > Reports > Human Resources External Reporting)
- Use the position with Type “2 – Supplement or Overage (Employee Specific)” if available based on the comments
- Otherwise, use the position with Type “4 - Temporarily Funded Supplement”
To determine the position number; for Faculty, Lecturers and Full Time Instructors

- run Supplement Positions for Full Time Employees Report (MyTC > Reports > Human Resources External Reporting). Up to four different types of positions can be displayed.
- Dependent on how it is being funded, select the position number based on the type:

<table>
<thead>
<tr>
<th>Type</th>
<th>When to Use</th>
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</thead>
<tbody>
<tr>
<td>2 – Supplement or Overage (Employee Specific)</td>
<td>Use if supplement applies to the employee named in the comments section. (This is a permanently budgeted position.)</td>
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<td>3 – Supplement or Overage (Non Employee Specific)</td>
<td>Use if the supplement is permanently budgeted in which case a budget transfer is not needed to fund. (This is a permanently budgeted position.)</td>
</tr>
<tr>
<td>4 – Temporarily Funded Supplement</td>
<td>Use if the supplement is not part of permanent budget and a temporary budget transfer is needed to fund</td>
</tr>
<tr>
<td>5 - Department Chair Supplement</td>
<td>Use when paying out a department chair stipend.</td>
</tr>
<tr>
<td>ePAF Approval Category</td>
<td>Availability</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Additional Job or Compensation – Salaried, ADDJB1</td>
<td>Year Round</td>
</tr>
<tr>
<td>Reinstate Job or Compensation Salaried, ADDJB6</td>
<td>Year Round</td>
</tr>
<tr>
<td>Reappt – Year Round (Salaried), REAP2</td>
<td>Year Round</td>
</tr>
<tr>
<td>Reappt – Year Round (Hourly), REAP3</td>
<td>Year Round</td>
</tr>
</tbody>
</table>
# Issue 5: Position Suffix vs Terminated Position

<table>
<thead>
<tr>
<th>ePAF Approval Category</th>
<th>Availability</th>
<th>Personnel Transactions</th>
<th>Scope</th>
<th>POSITION SUFFIX</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reinstate Job or Compensation Salaried, ADDJB6</td>
<td>Year Round</td>
<td>Supplemental income, overages, one-time payments (OTP)</td>
<td>Salaried except for Executive, Student, Union employees</td>
<td></td>
</tr>
<tr>
<td>Reappt – Year Round (Salaried), REAP2</td>
<td>Year Round</td>
<td>Reappointment</td>
<td>FT Faculty and Instructional, FT &amp; Exempt PT Professionals</td>
<td></td>
</tr>
<tr>
<td>Reappt – Year Round (Hourly), REAP3</td>
<td>Year Round</td>
<td>Reappointment</td>
<td>Non Exempt PT Professionals, Admin Fellows &amp; Interim</td>
<td></td>
</tr>
<tr>
<td>Additional Job or Compensation – Salaried, ADDJB1</td>
<td>Year Round</td>
<td>Supplemental income, overages, one-time payments (OTP), Secondary job</td>
<td>Salaried except for Executive, Student, Union employees</td>
<td></td>
</tr>
<tr>
<td>Additional Job - Hourly, ADDJB2</td>
<td>Year Round</td>
<td>Secondary job</td>
<td>Non Exempt PT Professionals, Admin Fellows &amp; Interim</td>
<td></td>
</tr>
</tbody>
</table>

If the position is Terminated as of the effective date of this new ePAF then use the suffix of the terminated position. This is typically 00, 01, etc. (do not use alphanumeric).

If the position is Active and there are no other terminated suffixes for the position then use ADDJB1 approval category.

This is typically 00. If suffix 00 for this position is Active then increment suffix ie from 00 to 01.
Issue 6: Query Date, Begin Date, Effective Date, Personnel Date

➢ For All Additional Jobs or Compensation ePAFs
  ○ Query Date = Begin Date = Effective Date = Personnel Date = Actual Start Date

➢ For All Reinstatement Job or Compensation or Year Round Reappointment ePAFs
  ○ Query Date = Effective Date = Personnel Date = Actual Reinstatement Date

Note: Actual Start Date or Actual Reinstatement Date usually falls on the start of the pay cycle.
## Issue 7: Hourly Rate ONLY ePAFs

<table>
<thead>
<tr>
<th>ePAF Approval Category</th>
<th>Availability</th>
<th>Personnel Transactions</th>
<th>Scope</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Job – Hourly, ADDJB2</td>
<td>Year Round</td>
<td>Secondary job</td>
<td>Hrly except for Student, Union employees</td>
<td>For hourly employees, please specify the Hourly Rate on the ePAF and enter the total amount to be paid in the Comments section. Otherwise the ePAF will be returned for correction.</td>
</tr>
<tr>
<td>Reappt – Year Round (Hourly), REAP3</td>
<td>Year Round</td>
<td>Reappointment</td>
<td>Non Exempt FT &amp; PT Professionals, Admin Fellows &amp; Interim</td>
<td></td>
</tr>
<tr>
<td>Hourly Rate Update, MODJB6</td>
<td>Year Round</td>
<td>Hourly Rate Adjustments</td>
<td>Hrly except for Student, Union employees</td>
<td></td>
</tr>
</tbody>
</table>
## Issue 8: Hourly Rate ePAFs - Total Amount in Comments

<table>
<thead>
<tr>
<th>ePAF Approval Category</th>
<th>Availability</th>
<th>Personnel Transactions</th>
<th>Scope</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Job – Hourly, ADDJB2</td>
<td>Year Round</td>
<td>Secondary job</td>
<td>Hourly except for Student, Union employees</td>
<td>For hourly employees, please specify the Hourly Rate on the ePAF and enter the total amount to be paid in the Comments section. Otherwise the ePAF be will returned for correction.</td>
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<td>Reappt – Year Round (Hourly), REAP3</td>
<td>Year Round</td>
<td>Reappointment</td>
<td>Non Exempt FT &amp; PT Professionals, Admin Fellows &amp; Interim</td>
<td></td>
</tr>
<tr>
<td>Hourly Rate Update, MODJB6</td>
<td>Year Round</td>
<td>Salary Adjustments</td>
<td>Hourly except for Student, Union employees</td>
<td></td>
</tr>
</tbody>
</table>
Issue 9: Budget or Grants Approval, or Both

- If Index (see ePAF Funding Allocation section) starts with 5 then Grants approval is required. Otherwise, Budget approval is required. Budget approves the following indices:
  1xxxxx - Operating Funded
  2xxxxx - Designated Funds
  62/4xxxxx - Spendable endowments
  65xxxx - Gifts

- If ePAF funding is split between Grants and Non-Grants indexes then both Grants and Budget need to approve. Please refer to the user guide for detail instructions.
Issue 10: Known Banner Issues

➢ Do not use Browser or MyTC back button.
➢ Do not have multiple tabs open with ePAFS. Keep it to one browser
➢ Query Date should equal the Effective Date of the Transaction
➢ Defaulted Values
  • Salary / Hourly Rate
  • Calendar Date Picker
➢ Manual Date Entry
Defaulted Values: Salary/Hourly Rate

Any ePAFs with a Salary or Hourly Rate have been defaulted to “0”

The ePAF will NOT error out, but be sure to update this to the correct amount - otherwise your employee will not get paid.
Some ePAFs will have 01/01/1900 defaulted into the date field. Update this field to the end date of the appointment/transaction.
Date Input: Manual Entry

1. **Manual entry**
   a. Click datepicker. Calendar will appear. Do not select date.
   b. Close the calendar by clicking the datepicker icon again. Calendar will disappear.
   c. Click into date field and cursor will appear.
   d. Manually type in date in format MM/DD/YYYY
Note / Next Steps:

User Guides: https://www.tc.columbia.edu/human-resources/workplace-resources/managers-toolkit/
Contact: hrsteam@tc.columbia.edu for systems related issues and inquiries
QUESTIONS ???