

EPAFs – Electronic Personnel Action Forms



EPAFs

EPAFs (Electronic Personnel Action Forms) are electronic appointment forms that are created by departments and updated into the Banner HR system by HR Records.

** You can register for an EPAF Training class via Learning Curve:
<https://learningcurve.memphis.edu>

** See [Appendix A](#) for Work Study Position Numbers

** See [Appendix B](#) for EPAF Terminology

** See [Appendix C](#) for FERPA Information

** See [Appendix D](#) for EPAF Troubleshooting

Items needed to complete an EPAF:

- An Accepted E-contract confirmation
- A GA position number
(**Note:** If you need to lookup a GA position #, see [Section 1 – GA Position Number Lookup.](#))

If you already have your GA position #, you can proceed to [Section 2 – How to Access and Create EPAFs.](#))

- A Social Security Number (SSN) on file in Banner
- A valid 'MA' Mailing Address

Section 1 – GA Position Number Lookup

1. If you don't know the Graduate Assistant (GA) position number for your department/organization or you want to verify that position number:

Go to the HR Program Guide via this link and execute a Position Lookup based on an index number or an organization code:

<http://bf.memphis.edu/spectrum/hr/positions.php>

2. (A) Click on index number if you wish to execute a lookup based on index number
 – OR –
 (B) Click on organization code if you wish to execute a lookup based on organization code.

The screenshot shows the 'Human Resources Program Guide' page. On the left is a navigation menu with categories: CODES (data standards manual, deduction codes, e-classes, earnings codes, suffix list), EMPLOYEE, and SELF SERVICE (accessing your info). The main content area is titled 'Non-Stimulus Positions Lookup' and includes a 'Print Version' link. Below the title, it states: 'You may search for a list of your non-stimulus positions either by **index number** or by **organization code**.' Red boxes highlight 'index number' and 'organization code', with red arrows labeled 'A' and 'B' pointing to them respectively. Below this is the 'Stimulus Positions Lookup' section, which states: 'You may search for a list of your stimulus positions by **organization code**.'

3. (C) For our example, we will perform an Organization Code Lookup.

Enter your organization code and click on .

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Human Resources
Program Guide

POSITIONS SEARCH [Print Version](#)

Positions Search Step 1: Lookup by Organization Code (NBAPBUD)

Position searches involve a two-step process.

Step 1: Enter department's organization code. (This search will retrieve the full FOAPAL)

Enter the organization code (all digits, no hyphens) in the field below.

Organization Code: C

CODES

- data standards manual
- deduction codes
- e-classes
- earnings codes
- suffix list

EMPLOYEE

SELF SERVICE

- accessing your info
- pay stub info
- troubleshooting

TRAINING

- instructor-led training
- training materials
- online training

4. (D) Click on Generate List of Positions for the appropriate Fund and Program.

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POSITIONS SEARCH RESULTS [Print Version](#)

Step 1 Results: Organization Code/FOAPAL Lookup

10 record(s) found.

Lookup Results for Org 315000				
Fund	Program	Activity	Location	Step 2
110001 (Undesignated E and G)	3650 (Academic Computing Support)			Generate List of Positions
124000 (Technology Access Fee)	2000 (General Academic Instruction)			Generate List of Positions
127705 (E-Learning Technology Services)	3100 (Community Service)			Generate List of Positions D
239800 (Dual Service Agreement Bowery)	3000 (Public Service Activities and Ctrs)			Generate List of Positions
239877 (Dual Service Vanderpool)	3000 (Public Service Activities and Ctrs)			Generate List of Positions
239878 (Dual Service Bowery)	3000 (Public Service Activities and Ctrs)			Generate List of Positions
931112 (Computer Systems Spt Vehicles)	4650 (Gen Admin and Logistical Services)	4134		Generate List of Positions

CODES

- data standards manual
- deduction codes
- e-classes
- earnings codes
- suffix list

EMPLOYEE

SELF SERVICE

- accessing your info
- pay stub info
- troubleshooting

TRAINING

- instructor-led training
- training materials
- online training
- registration lookup
- training evaluation
- reference cards
- matinees

UTILITIES

- position lookup

5. Note the **Position #** for the Position Title of **Graduate Assistant**.
If there is no Position # for the Position Title of Graduate Assistant, this means there is no Graduate Assistant position for the Fund/Org/Program line item you chose. If you need to have one created, please contact Financial Planning or Grants & Contracts.

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Human Resources
Program Guide

Step 2: Positions by FOAPAL Search Results Print Version

5 record(s) found.

CODES

data standards manual
deduction codes
e-classes
earnings codes
suffix list

EMPLOYEE

SELF SERVICE

accessing your info
pay stub info
troubleshooting

TRAINING

instructor-led training
training materials

Lookup Results (Fund 127705 Org 315000 Program 3100)								
Position #	Position Title	Account Code	ECLS	Single/ Pooled	Percentage Distribution	Active/ Cancelled	Budget Profile	Activity (if any)
012845	Coord IT Help Desk	61312	AD	S	100	A	LIMITD	
012658	Coord IT Help Desk	61312	AD	S	100	A	LIMITD	
012657	Technical Temporary Employee	61375	TH	P	100	A	EDUGEN	
012656	Student Assistant Regular	61410	ST	P	100	A	EDUGEN	
012655	Graduate Assistant	61657	GA	P	100	A	EDUGEN	

If you have any questions regarding this information, please contact Financial Planning at budget@memphis.edu.

Section 2 – How to Access and Create EPAFs

1. Navigate to the University of Memphis myMemphis portal at <https://my.memphis.edu>.
2. Enter your UUID (*User Name*) and *Password*, click **Login**.

myMEMPHIS THE UNIVERSITY OF MEMPHIS

Secure Access Login

User Name:

Password:

Having problems logging in? [Click here.](#)

Initialize Your Account
Alumni & Friends: Sign Up
Forgot Your Password?
Forgot Your UUID?
Help

Welcome to the myMemphis portal - your source for personalized online resources at the University of Memphis.

Important Notices

Always log out of the myMemphis portal and close your browser windows when you have completed your session so no one else has access to your personal records. Even if you follow an outside link, you will remain logged in until you hit the log out button.

Never share your password with anyone. Your password gives those who have it access to your personal information and any other secured University information accessible to you.

Need additional help? Contact the ITD Helpdesk at (901) 678-8888.

3. Click on your **Employee Tab**.

myMEMPHIS THE UNIVERSITY OF MEMPHIS

My Account | Welcome Kenyatta Brandon-Adams
Content Layout | You are currently logged in.

E-mail Datebook Groups Logout Help

Home eCampus Resources **Employee** ST Test Finance ITD KBA Trad. Tab KBA Daily URLs KBA Trad from Framed

July 7, 2010

4. If your E-contract indicated that the GA has a valid SSN on file:
 - **Go to Step 5.**

If your E-contract indicated that the GA did not have a valid SSN on file at the time of acceptance:

- Go to your **Banner INB Channel**
- Click on the **Banner INB Users** link
- Logon with your UUID (Username) and Password

Banner INB

Note: As of December 17, 2008, if you use your home computer, a laptop, or other mobile device to access Internet Native Banner (INB) or restricted University data, you will need to use the VPN. Need help?

Due to a recent Java update, you may see the following message when opening INB: "Java has discovered application components that could indicate a security concern". In order to use INB, you need to select "No" to the "Block potentially unsafe components from being run" prompt. We are currently working to resolve the issue.

Banner INB Users (in new browser window)

Note: If you receive the error message "WEB Client Version too old" you must clear the workstation's JAVA cache. Step-by-step instructions are available here.

Note: Banner INB requires a Java plug-in (JPI). If this workstation does not have an installed version of the Java plug-in, you can download one using the following link:

[Download Java Plug-In](#)

Logon

Username:

Password:

Database:

- In the Go To... box, enter **GUIALTI**
- Press Enter

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Help

General Menu GUAGMNU 8.2 (PROD) - Wednesday August 11, 2010 - Last login Wednesday August 11, 2010 03:17 PM


Go To... Welcome, UOMRPT. Products: [Menu](#) | [Site Map](#) | [Help Center](#)

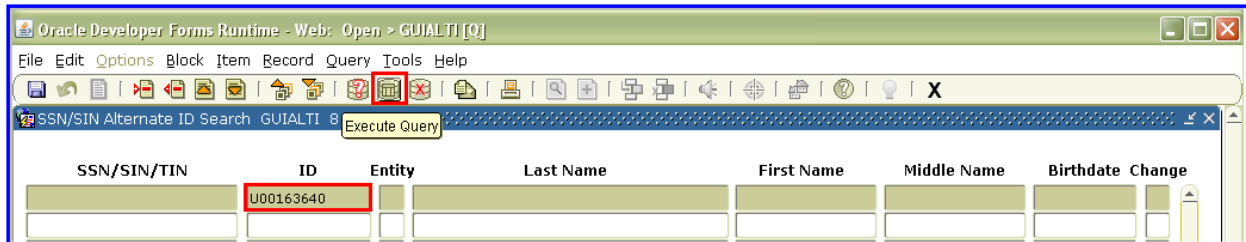
My Banner

- Banner**
 - Student [*STUDENT]
 - Advancement [*ALUMNI]
 - Financial [*FINANCE]

My Links

- [Change Banner Password](#)
- [Check Banner Messages](#)
- Personal Link 1

- Under ID enter the GA's Banner ID (found on the accepted E-contract).
- Click on the Execute query icon  - or - F8.



Oracle Developer Forms Runtime - Web: Open > GUIALTI [Q]

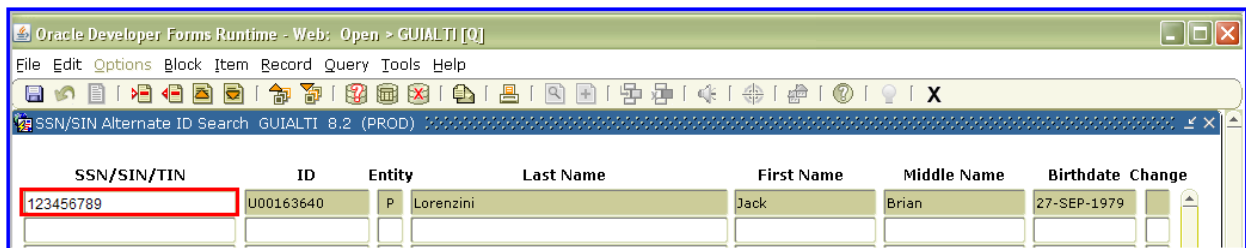
File Edit Options Block Item Record Query Tools Help

SSN/SIN Alternate ID Search GUIALTI 8

Execute Query

SSN/SIN/TIN	ID	Entity	Last Name	First Name	Middle Name	Birthdate	Change
	U00163640						

- Verify that the GA now has a valid SSN on file:




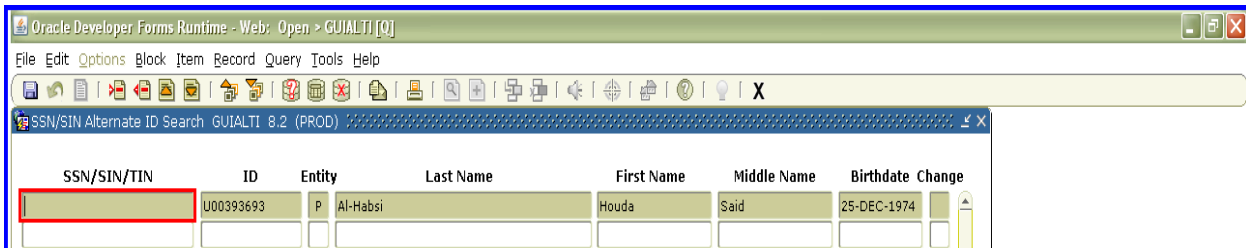
Oracle Developer Forms Runtime - Web: Open > GUIALTI [Q]

File Edit Options Block Item Record Query Tools Help

SSN/SIN Alternate ID Search GUIALTI 8.2 (PROD)

SSN/SIN/TIN	ID	Entity	Last Name	First Name	Middle Name	Birthdate	Change
123456789	U00163640	P	Lorenzini	Jack	Brian	27-SEP-1979	

- If the GA now has a valid SSN:
 - Logout of Banner INB by clicking on the red  at top right of screen.
 - Go to Step 5.
- If the GA still does not have a valid SSN:
 - **STOP. LOGOUT.**
 (EPAF cannot proceed until a SSN is on file in Banner).



Oracle Developer Forms Runtime - Web: Open > GUIALTI [Q]

File Edit Options Block Item Record Query Tools Help

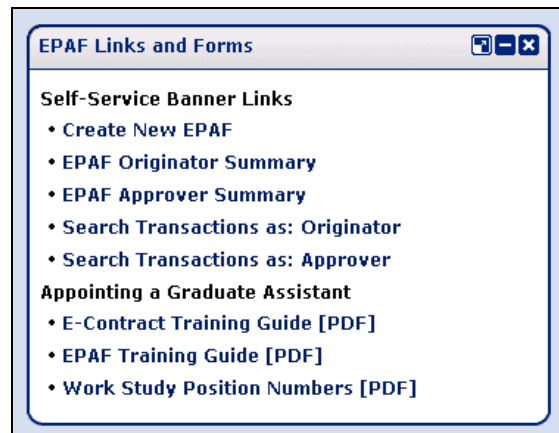
SSN/SIN Alternate ID Search GUIALTI 8.2 (PROD)

SSN/SIN/TIN	ID	Entity	Last Name	First Name	Middle Name	Birthdate	Change
	U00393693	P	Al-Habsi	Houda	Said	25-DEC-1974	

NOTE: All students are required to have a Social Security number on file before payment of the stipend can be disbursed. International students will be required to obtain a Social Security number upon arrival. There could be a delay in the first payment of your stipend if the Social Security number is not on file. For additional information go to www.ssa.gov.

5. On the **Employee** tab, find the **EPAF Links and Forms** Channel .
This channel is accessed to both create and approve EPAFs.
To begin a new EPAF, Click the **Create New EPAF** link.

Note: If you don't see this channel, you can find information on adding channels in the [Intro to Portal](#) training document.



6. If you are creating this EPAF for a student who has "*never been employed*" at the University in any capacity – Go to Section 2A:

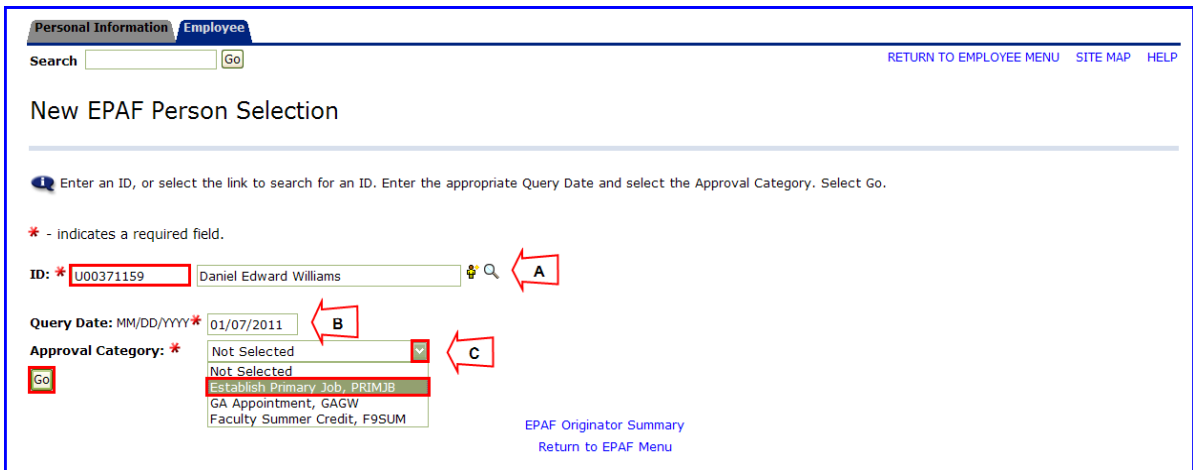
If you are creating this EPAF for a student who "*has been employed*" at the University previously in any capacity – Go To Section 2B:

Section 2A – New Appointment

1. EPAF for a student who has “*never been employed*” at the University in any capacity:

- (A) Enter the **Banner Id** (found on the accepted E-contract) of the person you’re creating the EPAF for.
Click **Tab** on your keyboard. (The person’s name should default in.)
- (B) **Do not change** the **Query Date**.
- (C) Click on the drop-down arrow beside **Approval Category** and choose **Establish Primary Job, PRIMJB**.


Click  .



2. Click on All Jobs.

Note: If any line items appear, this means the appointee has been employed at the University previously and the **Establish Primary Job, PRIMJB** EPAF is not needed. Proceed to Section 2B and complete a Reappointment EPAF.

3. On the New Job line: **Position** - Enter "ZZPRIM"
Suffix - Enter "00"

Click  .

4. Verify that the Suffix you entered appears in the section headings on the next screen.

Example (New Appointment):

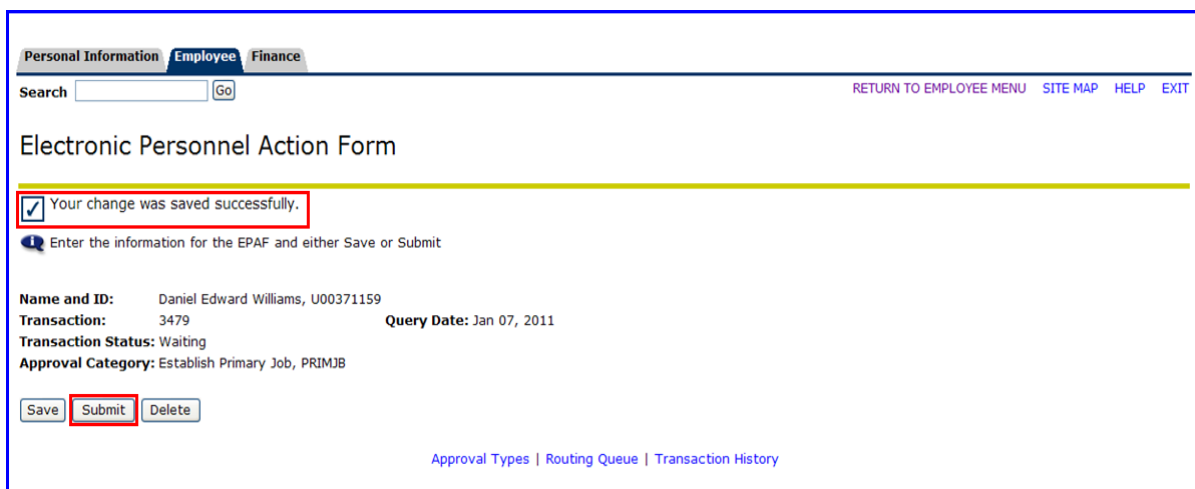
Employee Record, ZZPRIM-00 NO PAY EPAF PRIM JOB

5. The next sections (Employee Record, Establish New Employee, and End of Contract) will be auto-populated for you.
** **Do not change** any of the values on this screen.

6. Click .

7. If No Errors, Your change was saved successfully.

8. Click .



Personal Information Employee Finance

Search Go [RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Electronic Personnel Action Form

Your change was saved successfully.

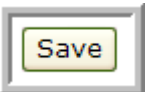
Enter the information for the EPAF and either Save or Submit

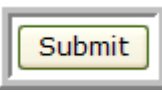
Name and ID: Daniel Edward Williams, U00371159
Transaction: 3479 **Query Date:** Jan 07, 2011
Transaction Status: Waiting
Approval Category: Establish Primary Job, PRIMJB

[Approval Types](#) | [Routing Queue](#) | [Transaction History](#)

9. **Keep in mind:** With a **New Appointment** (student's first time on the University payroll), you must process a 'GAGW' EPAF to load the actual assignment(s). However, you must wait overnight before beginning that process => Section 2B.

10. If Errors, they will appear on the screen.
Correct the Errors.

Click .

Click .

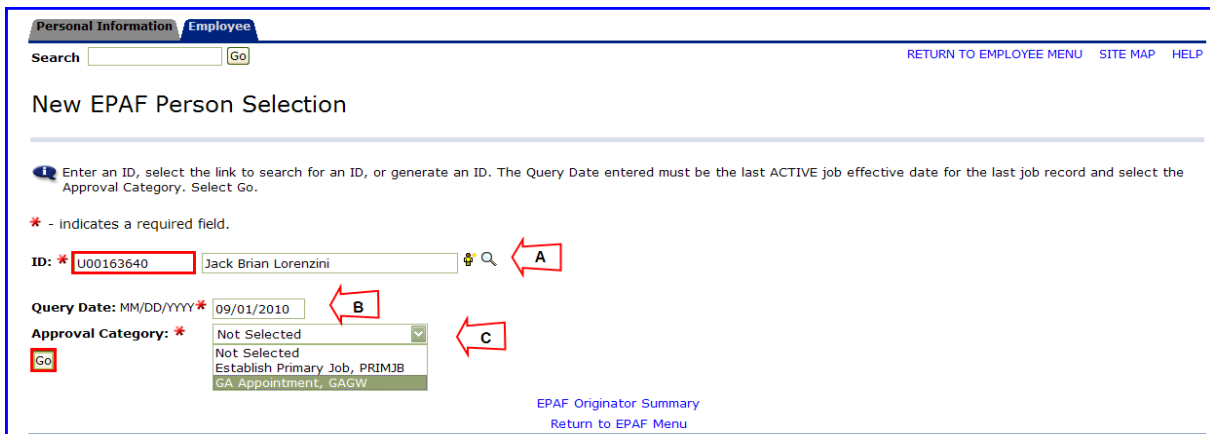
Section 2B – Reappointment: Fall/Spring & Summer Non-Teaching

NOTE: For GA Reappointment EPAFs for Summer Credit Instruction only, go to Section 2C.

1. EPAF for a student who “has been employed” at the University previously :

- (A) Enter the **Banner Id** (found on the accepted E-contract) of the person you’re creating the EPAF for.
Click **Tab** on your keyboard. (The person’s name should default in.)
- (B) Change the **Query Date** to match the Assignment Begin Date on the accepted E-contract (i.e. Job Effective Date (Appointment)).
- (C) Click on the drop-down arrow beside **Approval Category** and choose **GA Appointment, GAGW**.

Click  .



Personal Information Employee

Search [RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#)

New EPAF Person Selection

i Enter an ID, select the link to search for an ID, or generate an ID. The Query Date entered must be the last ACTIVE job effective date for the last job record and select the Approval Category. Select Go.

* - indicates a required field.

ID: * A

Query Date: MM/DD/YYYY * B

Approval Category: * C

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

2. Click on All Jobs.

Note: If no previous jobs appear, then an **Establish Primary Job, PRIMJB** EPAF will need to be completed. Go to Section 2A and complete an **Establish Primary Job** EPAF.

Personal Information Employee

Search RETURN TO EMPLOYEE MENU SITE MAP HELP

New EPAF Job Selection

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

ID: Jack Brian Lorenzini, U00163640
Query Date: Sep 01, 2010
Approval Category: GA Appointment, GAGW

Job Record, NW_JOB

Search Type	Position	Suffix Title	Time Sheet	Organization	Start Date	End Date	Last Paid Date	Status	Select
New Job	<input type="text"/>	<input type="text"/>							<input type="radio"/>
Secondary	003805	03 Graduate Assistant	208000, History		Oct 01, 2010	Dec 31, 2010		Active	<input type="radio"/>
Primary	003805	04 Graduate Assistant	208000, History		Feb 01, 2011	Apr 30, 2011		Active	<input type="radio"/>
Primary	GW0100	05 Graduate Assistant CWSP	208000, History		Sep 01, 2010	Sep 30, 2010	Sep 30, 2010	Active	<input type="radio"/>
Primary	GW0100	06 Graduate Assistant CWSP	208000, History		Jan 01, 2011	Jan 31, 2011		Active	<input type="radio"/>

New EPAF
Return to EPAF Menu

3. On the New Job line: **Position** - Enter the appropriate GA position number
Suffix - Enter the next sequential two digit number for that position. *****Note.**

** If the desired position number is not listed, enter it in the **Position** field with a **Suffix** of 00.

Personal Information Employee

Search RETURN TO EMPLOYEE MENU SITE MAP HELP

New EPAF Job Selection

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

ID: Jack Brian Lorenzini, U00163640
Query Date: Sep 01, 2010
Approval Category: GA Appointment, GAGW

Job Record, NW_JOB

Search Type	Position	Suffix Title	Time Sheet	Organization	Start Date	End Date	Last Paid Date	Status	Select
New Job	<input type="text"/>	<input type="text"/>							<input type="radio"/>
Secondary	003805	03 Graduate Assistant	208000, History		Oct 01, 2010	Dec 31, 2010		Active	<input type="radio"/>
Primary	003805	04 Graduate Assistant	208000, History		Feb 01, 2011	Apr 30, 2011		Active	<input type="radio"/>
Primary	GW0100	05 Graduate Assistant CWSP	208000, History		Sep 01, 2010	Sep 30, 2010	Sep 30, 2010	Active	<input type="radio"/>
Primary	GW0100	06 Graduate Assistant CWSP	208000, History		Jan 01, 2011	Jan 31, 2011		Active	<input type="radio"/>

New EPAF
Return to EPAF Menu

Click .

***** Note:** If you are **reappointing a GW**, the **Suffix** will always be "00".
To select the GW 00, Click on the radio button under Select for that line item and

Click .

If no previous line item exists for your GW position number, then enter the position number on the New Job line with a "00" suffix **and**

Click  .

Personal Information / **Employee**

Search RETURN TO EMPLOYEE MENU SITE MAP HELP

New EPAF Job Selection

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

ID: Jack Brian Lorenzini, U00163640
Query Date: Jan 07, 2011
Approval Category: GA Appointment, GAGW

Job Assignment, NW_JOB	Search Type	Position	Suffix	Title	Time Sheet	Organization	Start Date	End Date	Last Paid Date	Status	Select
New Job											<input type="button" value="o"/>
Secondary	003805	00		Graduate Assistant		208000, History	Oct 01, 2006	Apr 30, 2007	Apr 30, 2007	Terminated	<input type="button" value="o"/>
Secondary	003805	01		Graduate Assistant		208000, History	Oct 01, 2007	Dec 31, 2007	Dec 31, 2007	Terminated	<input type="button" value="o"/>
Secondary	003805	02		Graduate Assistant		208000, History	Feb 01, 2008	Apr 30, 2010	Apr 30, 2010	Terminated	<input type="button" value="o"/>
Secondary	003805	03		Graduate Assistant		208000, History	Oct 01, 2010	Dec 31, 2010	Dec 31, 2010	Terminated	<input type="button" value="o"/>
Primary	003805	04		Graduate Assistant		208000, History	Feb 01, 2011	Apr 30, 2011		Active	<input type="button" value="o"/>
Primary		GW0100	00	Graduate Assistant		208000, History	Sep 01, 2006	Sep 30, 2006	Sep 30, 2006	Terminated	<input type="button" value="o"/>

4. Verify that the Suffix you entered appears in the section headings on the next screen.

Example (Reappointment):

Employee Record, 003805-05 Graduate Assistant

5. Employee Record section (New Values):

- Employee Class Code:** Will always be "GA". User cannot change.
- Employee Group Code:** Will always be "GRD". User cannot change.
- Home COAS:** Will always be "U". User cannot change.
- Home Organization and Distribution Orgn:** Enter the Main/Home Organization Code for the GA. These two org codes should always match.
- Current Hire Date:** Auto-populates from the Query date. Should always be the 1st day of the student's Assignment Begin Date.
- Employee Status:** Will always be "A". User cannot change.

Employee Record, 003805-05 Graduate Assistant		
Item	Current Value	New Value
Employee Class Code: (Not Overrideable)	GA, Graduate Assistant	<input type="text" value="GA"/>
Employee Group Code: (Not Overrideable)	GR1, Graduate Assistant - Teaching	<input type="text" value="GRD"/>
Home COAS: (Not Overrideable)	U	<input type="text" value="U"/>
Home Organization:	208000, History	<input type="text" value=""/>
Distribution Orgn:	208000, History	<input type="text" value=""/>
Current Hire Date: MM/DD/YYYY	09/01/2006	<input type="text" value="09/01/2010"/>
Employee Status: (Not Overrideable)	Active	<input type="text" value="A"/>

6. Job Assignment section (New Values):

- Job Begin Date:** Should always be the 1st day of the student's Assignment Begin Date.
(**Only exception:** On GW positions that have been previously occupied, keep the Job Begin Date shown in the Current Value column.)
- Contract Type:** Auto-populates to "S" (Secondary). User cannot change.
- Jobs Effective Date:** Auto-populates from the Query date. Should always be the 1st day of the student's Assignment Begin Date.
- Personnel Date:** Date the GA reports to work.
(The GA's actual 1st day at work.)
- Annual Salary:** Total Salary for the position **this EPAF** is created for. You can enter the salary amount with or without decimals.
(**IMPORTANT:** The Total Annual Salary could be divided between multiple positions and each position would require a separate EPAF.)

Factor: The number to divide the Annual Salary by.


Pays: The number of paychecks the GA is to receive from this position number.

(Note: Factor and Pays should always be the same number. They default in as 8 / 8 indicating a full academic year.

If changed from 8 / 8, whatever they are changed to must both be the same. **For Example:** If you change Factor to 4, you must also change Pays to 4.)


Job Status: Auto-populates to “A”. User cannot change

Job Reason Code: Use the drop-down to select the appropriate value.

Valid Choices: 

- GR1, Graduate Assistant - Teaching
- GR2, Graduate Assistant - Research
- GR3, Graduate Assistant - Service
- GR4, Graduate Assistant - Clinical
- GR5, Graduate Assistant - Teach Asst

Step: Auto-populates to “0”. User cannot change.

Job Assignment, 003805-05 Graduate Assistant		
Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		<input type="text"/>
Contract Type: (Not Overrideable)		<input type="text" value="S"/>
Jobs Effective Date: MM/DD/YYYY		<input type="text" value="09/01/2010"/>
Personnel Date: MM/DD/YYYY		<input type="text"/>
Annual Salary:		<input type="text"/>
Factor:		<input type="text" value="8"/>
Pays:		<input type="text" value="8"/>
Job Status: (Not Overrideable)		<input type="text" value="A"/>
Job Change Reason:		<input type="text" value="GR1, Graduate Assistant - Teaching"/> 
Step: (Not Overrideable)		<input type="text" value="0"/>

7. Job Labor Distribution section:

Effective Date: Auto-populates from the Query date. Should always be the 1st day of the student's Assignment Begin Date.

Labor Distribution area: (D) Labor Distribution – **DO NOT CHANGE**, but verify that your FOAPAL information is correct for the GA position. If it is not correct, you may have selected the wrong position number and you should start over.
**** For GW positions**, the Financial Aid office is responsible for handling the 75%/25% funding split.

Job Labor Distribution, 003805-05 Graduate Assistant

Current
 Effective Date: 09/01/2010
 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New
 Effective Date: MM/DD/YYYY 09/01/2010

COA Index	Fund	Organization Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
U	110001	208000	61257	2000				100.00			
Total:								100.00			

Save and Add New Rows

8. End of Contract section (New Values):

Jobs Effective Date: Should always be the **last day** of the student's Assignment End Date (i.e. the Job Effective Date (Termination) from the accepted E-contract).

Job Status: Auto-populates to "T". User cannot change.

Job Change Reason: Auto-populates to "EOCN" (End of Contract). User cannot change.

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY		<input type="text"/>
Job Status: (Not Overrideable)		<input type="text" value="T"/>
Job Change Reason: (Not Overrideable)		<input type="text" value="EOCN"/>

9. Routing Queue section:

Department Approvers: Enter the username of the Approving Financial Manager.

Grad School: The username of the Grad School Approver is pre-populated.

HR Records: The username of the HR Approver is pre-populated.

If you don't know an approver's username:

- Click on the magnifying glass beside that Approval Level and it will display a list of valid approvers.
- Select an Approver from the list and click Select.

Note: If your department requires **Dean/VP approval:**

- Add an Approval Level line Item for **(DN_DIR) Dean/Directors**
- Under **Required Action** for this item, choose **Approve** (Required Approval) -or- **FYI** (Optional Approval) .

**** The EPAF will not move forward until each level marked "Approve" or "Apply" takes action. If a level is marked "FYI", it is optional.**

Routing Queue			
Approval Level	User Name		Required Action
10 - (DEPT) Department Approvers	DMLINTON	Daniel M Linton	Approve
40 - (GSEPAF) Grad School	GSEPAF	Graduate School	Approve
90 - (HREPAF) HR Records	HREPAF	HR Records	Apply
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected

Save and Add New Rows

10. Comment section:

Comments box:

Enter any comments you have for the Approvers.
If none, leave blank.

Comment

11. Click .

12. If No Errors, Your change was saved successfully.

13. Click .

Personal Information Employee

Search Go RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT

Electronic Personnel Action Form

Your change was saved successfully.

Enter the information for the EPAF and either Save or Submit

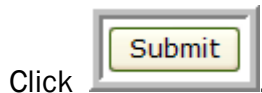
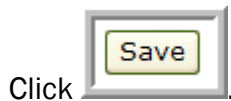
Warning: User does not have access to view current values.

Name and ID: Jack Brian Lorenzini, U00163640 **Query Date:** Sep 01, 2010
Transaction: 3248
Transaction Status: Waiting
Approval Category: GA reappt to old or new position, GAAPPT

Save Submit Delete

[Approval Types](#) | [Account Distribution](#) | [Comments](#) | [Routing Queue](#) | [Transaction History](#)

14. If Errors, they will appear on the screen.
Correct the Errors.



15. The EPAF must now be approved by the Department Approver.
The Department Approver may access the **EPAF Approver Summary** via the EPAF Links and Forms Channel under his/her Employee Tab in the myMemphis portal.

To Approve:

- (A) Click on the Appointee's Name.

Employee	Type of Change	Effective Date	Action
Lorenzini, Jack B. U00163640	GA Appointment	Sep 01, 2010	Pending
Graduate Assistant, 003805 - 05			
Watson, Andrea N. U00008151	GA Appointment	Feb 01, 2011	Pending
Graduate Assistant, 003820 - 00			

- (B) Review the information.

- (C) Click Approve.

Personal Information **Employee** **Finance**

Search [RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#)

EPAF Preview

You are acting as an Approver.

Name and ID: Jack Brian Lorenzini, U00163640 **Job and Suffix:** 003805-05, Graduate Assistant
Transaction: 3535 **Query Date:** Sep 01, 2010
Transaction Status: Pending **Last Paid Date:**
Approval Category: GA Appointment, GAGW
⊖ Previous Next ⊕

[Add Comment](#)


[Approval Types](#) | [Account Distribution](#) | [Comments](#) | [Routing Queue](#) | [Transaction History](#)

Section 2C – Reappointment: Summer Credit Instruction


1. All summer credit instructions EPAFs for GAs will be reappointments.
 - (A) Enter the **Banner ID** (found on the accepted E-contract) of the person you're creating the EPAF for.
Click **Tab** on your keyboard. (The person's name should default in.)
 - (B) Change the **Query Date** to match the Assignment Begin Date on the accepted E-contract (i.e. Job Effective Date (Appointment)).
 - (C) Click on the drop-down arrow beside **Approval Category** and choose **GA Summer Credit Teaching, GASMCR**.

Click  .


New EPAF Person Selection

 Enter an ID, or select the link to search for an ID. Enter the app

* - Indicates a required field.

ID: * 

Query Date: MM/DD/YYYY*

Approval Category: * 

Go

Not Selected

Establish Primary Job, PRIMJB

GA Appointment, GAGW

GA Summer Credit, GASMCR


2. Click on All Jobs.

Note: If no previous jobs appear, then an **Establish Primary Job, PRIMJB** EPAF will need to be completed. Go to Section 2A and complete an **Establish Primary Job** EPAF.

Personal Information / **Employee**






Search RETURN TO EMPLOYEE MENU SITE MAP HELP

New EPAF Job Selection

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

ID: Jack Brian Lorenzini, U00163640
Query Date: Sep 01, 2010
Approval Category: GA Appointment, GAGW

Job Record, NW_JOB

Search Type	Position	Suffix	Title	Time Sheet	Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="checkbox"/>	New Job									
<input type="checkbox"/>	Secondary	003805	03	Graduate Assistant	208000, History	Oct 01, 2010	Dec 31, 2010		Active	
<input type="checkbox"/>	Primary	003805	04	Graduate Assistant	208000, History	Feb 01, 2011	Apr 30, 2011		Active	
<input type="checkbox"/>	Primary	GW0100	05	Graduate Assistant CWSP	208000, History	Sep 01, 2010	Sep 30, 2010	Sep 30, 2010	Active	
<input type="checkbox"/>	Primary	GW0100	06	Graduate Assistant CWSP	208000, History	Jan 01, 2011	Jan 31, 2011		Active	

New EPAF
Return to EPAF Menu

- On the New Job line: **Position** - Enter the appropriate GA position number
Suffix - Enter the next sequential two digit number for that position.

*****Note.**** If the desired position number is not listed, enter it in the **Position** field with a **Suffix** of 00.

Personal Information Employee

Search Go RETURN TO EMPLOYEE MENU SITE MAP HELP

New EPAF Job Selection

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

ID: Jack Brian Lorenzini, U00163640
Query Date: Sep 01, 2010
Approval Category: GA Appointment, GAGW

Job Record, NW_JOB

Search Type	Position	Suffix	Title	Time Sheet	Organization	Start Date	End Date	Last Paid Date	Status	Select
New Job	003805	05	Graduate Assistant		208000, History					<input type="radio"/>
Secondary	003805	03	Graduate Assistant		208000, History	Oct 01, 2010	Dec 31, 2010		Active	<input type="radio"/>
Primary	003805	04	Graduate Assistant		208000, History	Feb 01, 2011	Apr 30, 2011		Active	<input type="radio"/>
Primary	GW0100	05	Graduate Assistant CWSP		208000, History	Sep 01, 2010	Sep 30, 2010	Sep 30, 2010	Active	<input type="radio"/>
Primary	GW0100	06	Graduate Assistant CWSP		208000, History	Jan 01, 2011	Jan 31, 2011		Active	<input type="radio"/>

All Jobs Go

New EPAF
Return to EPAF Menu

Click .

***** Note:** There are no work study graduate assistantships (GW) in the summer.

- Verify that the Suffix you entered appears in the section headings on the next screen.

Example (Reappointment):

Employee Record, 003805-05 Graduate Assistant

5. Job Assignment section (New Values):

Job Begin Date:	Should always be the 1 st day of the student's Assignment Begin Date. Defaults from Query Date. Consult the Provost's Web site for Summer School Guidelines and dates.
Contract Type:	Auto-populates to "S" (Secondary). User cannot change.
Jobs Effective Date:	Auto-populates from the Query date. Should always be the 1 st day of the student's Assignment Begin Date.
Personnel Date:	Date the GA reports to work. (The GA's actual 1 st day at work.)
Annual Salary:	Total Salary for the position this EPAF is created for. You can enter the salary amount with or without decimals. (IMPORTANT: The Total Annual Salary could be divided between multiple positions and each position would require a separate EPAF.)
Factor:	The number to divide the Annual Salary by.
Pays:	The number of paychecks the GA is to receive from this position number. (Note: Factor and Pays should always be the same number.)
Job Status:	Auto-populates to "A". User cannot change
Job Reason Code:	Use the drop-down to select the appropriate value. Valid Choices: SC1ST - 1st Summer SC1TC - 1st Teacher Summer SC2ND - 2nd Summer SC2TC - 2nd Teacher Summer SCFUL - Full Summer SCPRE - Pre Summer SCROD - RODP Summer
Step:	Auto-populates to "0". User cannot change.

Job Assignment, 003805-05 Graduate Assistant	
Item	Current Value New Value
Job Begin Date: MM/DD/YYYY	<input type="text"/>
Contract Type: (Not Overrideable)	<input type="text" value="S"/>
Jobs Effective Date: MM/DD/YYYY	<input type="text" value="09/01/2010"/>
Personnel Date: MM/DD/YYYY	<input type="text"/>
Annual Salary:	<input type="text"/>
Factor:	<input type="text" value="8"/>
Pays:	<input type="text" value="8"/>
Job Status: (Not Overrideable)	<input type="text" value="A"/>

6. Earnings section (New Values):

- Effective Date:** Should always be the 1st day of the student's Assignment Begin Date.
- Earnings:** Should always be **201, Summer Temporary Credit Instruction**.
- Hours or Units Per Pay:** Will always be **1**.
- Deemed Hours:** Leave blank.
- Special Rate:** The monthly pay rate.
- Shift:** Should always be **1**. Auto-populated.
- End Date:** Leave blank.

Earnings, 009297-00 Graduate Assistant							
Current							
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date	Remove
MM/DD/YYYY						MM/DD/YYYY	
<input type="text" value="06/01/2011"/>	201, Summer Temporary Credit Instru	<input type="text"/>	<input type="text"/>	<input type="text"/>	1	<input type="text"/>	<input type="text"/>
<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	1	<input type="text"/>	<input type="text"/>
<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	1	<input type="text"/>	<input type="text"/>
<input type="text"/>	Not Selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	1	<input type="text"/>	<input type="text"/>

7. Job Labor Distribution section:

Effective Date: Auto-populates from the Query date. Should always be the 1st day of the student's Assignment Begin Date.

Labor Distribution area: (D) Labor Distribution – Account code should be changed to Account Code 61256 for Summer. DO NOT CHANGE other FOAPAL information.

Job Labor Distribution, 003805-05 Graduate Assistant

Current
Effective Date: 09/01/2010
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New
Effective Date: MM/DD/YYYY 09/01/2010

COA Index	Fund	Organization Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
U	110001	208000	61257	2000				100.00			
								Total:	100.00		

Save and Add New Rows

8. End of Contract section (New Values):

Jobs Effective Date: Should always be the **last day** of the student's Assignment End Date (i.e. the Job Effective Date (Termination) from the accepted E-contract).

Job Status: Auto-populates to "T". User cannot change.

Job Change Reason: Auto-populates to "EOCN" (End of Contract). User cannot change.

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY		<input type="text"/>
Job Status: (Not Overrideable)		<input type="text" value="T"/>
Job Change Reason: (Not Overrideable)		<input type="text" value="EOCN"/>

9. Routing Queue section:

Department Approvers: Enter the username of the Approving Financial Manager.

Grad School: The username of the Grad School Approver is pre-populated. If not, enter **GSEPAF**.

HR Records: The username of the HR Approver is pre-populated. If not, enter **HREPAF**.

If you don't know an approver's username:

- Click on the magnifying glass beside that Approval Level and it will display a list of valid approvers.
- Select an Approver from the list and click Select.

Note: If your department requires **Dean/VP approval:**

- Add an Approval Level line Item for **(DN_DIR) Dean/Directors**
- Under **Required Action** for this item, choose **Approve** (Required Approval) -or- **FYI** (Optional Approval) .

**** The EPAF will not move forward until each level marked "Approve" or "Apply" takes action. If a level is marked "FYI", it is optional.**

Routing Queue

Approval Level	User Name	Required Action
10 - (DEPT) Department Approvers	DMLINTON Daniel M Linton	Approve
40 - (GSEPAF) Grad School	GSEPAF Graduate School	Approve
90 - (HREPAF) HR Records	HREPAF HR Records	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Save and Add New Rows

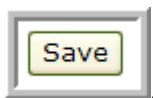
10. **Comment section:**

Comments box:

Enter any comments you have for the Approvers.
If none, leave blank.

Comment

11. Click

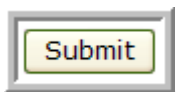


12. If No Errors,

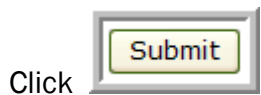
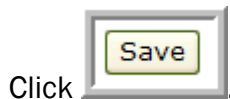


Your change was saved successfully.

13. Click



14. If Errors, they will appear on the screen.
Correct the Errors.



15. The EPAF must now be approved by the Department Approver. The Approver should receive an e-mail regarding this. The Department Approver may access **Pending EPAFs** via the EPAF Forms and Links Channel under his/her Employee Tab in the myMemphis portal.

To Approve:

- (A) Choose EPAF Approver Summary, then click on the Appointee's Name.

Employee	Type of Change	Effective Date	Action
Lorenzini, Jack B. U00163640	GA Appointment	Sep 01, 2010	Pending
Graduate Assistant, 003805 - 05			
Watson, Andrea N. U00008151	GA Appointment	Feb 01, 2011	Pending
Graduate Assistant, 003820 - 00			

(B) Review the information.

(C) Click Approve.

Personal Information **Employee** **Finance**

Search [RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#)

EPAF Preview

You are acting as an Approver.

Name and ID: Jack Brian Lorenzini, U00163640 **Job and Suffix:** 003805-05, Graduate Assistant
Transaction: 3535 **Query Date:** Sep 01, 2010
Transaction Status: Pending **Last Paid Date:**
Approval Category: GA Appointment, GAGW

[Previous](#) [Next](#)

[Add Comment](#)

[Approval Types](#) | [Account Distribution](#) | [Comments](#) | [Routing Queue](#) | [Transaction History](#)

Appendix A: Work Study Position Numbers

Index Number Range		Position Number
From	To	
210000	219999	GW0100
220000	229999	GW0200
230000	239999	GW0300
240000	249999	GW0400
250000	259999	GW0500
260000	269999	GW0600
270000	279999	GW0700

Appendix B: EPAF Terminology

- **Originator:** The designated employee with a department who begins the EPAF.
- **Approver:** The person(s) who approve(s) the EPAF. GA EPAFs have 2 approvers: the department's financial manager AND the Graduate School.
- **Proxy:** The person(s) who may act on behalf of the approver (similar to Web Time Entry).
- **FYI/Acknowledger:** The individuals who can indicate acceptance of an EPAF on an optional basis. The Dean/VP is always an acknowledger.
- **Applier:** The person who actually updates the final EPAF to Banner for payment. The applier is always HR Records.
- **Suffix:** A two-digit number (starting with 00) that should be increased sequentially, indicating the next available assignment for a given position number (including GWs). This associates a student to a particular instance of a job. The suffix is not updated automatically; it must be increased sequentially by the user at the time of entry. (Example: 001234-00 previous appointment would be 001234-01 for reappointment)
- **Employee Class Code:** The e-class for the appointee. For GAs, the e-class is always GA, even for work study students. Updates PEAEMPL only.
- **Employee Group Code:** Identifies the duties that the GA will be performing during this assignment. (Example: GR1 = Instructor of record)
- **Home Organization:** The actual department org under which the student will be assigned.
- **Query Date:** On a GAGW EPAF, should always match the "Assignment Begin Date" from the E-contract.
- **Current Hire Date:** Should always match the "Assignment Begin Date" from the E-contract.

REAPPOINTMENT

- **Job Begin Date (Reappointment):** Should always match the "Assignment Begin Date" from the E-contract.
- **Jobs Effective Date (Reappointment):** Should always match the "Assignment Begin Date" from the E-contract.
- **Personnel Date (Reappointment):** Actual first day that the student should report to work. (Previously the Current Service Begin Date on the paper contract.)

TERMINATION

- **Jobs Effective Date (Termination):** Should always match the “Assignment End Date” from the E-contract.

Appendix C: FERPA

Any student who will be performing duties as Instructor of Record must complete the FERPA tutorial before the student can be assigned to a course. The University's FERPA Policy should also be reviewed for the teaching student's own protection.

Any student who may be assisting an instructor and thereby have access to student records and information must also complete the FERPA Tutorial and should read the University's FERPA policy.

The FERPA tutorial can be found at <https://itweb2.memphis.edu/ferpa/login.php>. The University FERPA policy can be found at <http://policies.memphis.edu/UM1248.htm>.

Appendix D: EPAF Troubleshooting

Issue	Solution
When does the system send e-mails regarding EPAF statuses?	The originator of the EPAF will receive an automatically generated email when the EPAF has been applied, returned for correction, or is waiting without action after a certain time period . In addition, the Approver will receive an email when the EPAF is ready to be approved.
How do I know if my EPAF has been returned for correction?	You should receive an email notification should your EPAF be returned. You can check your EPAF Originator Summary and view its Current tab to see any EPAFs that may have been returned to you for correction. The EPAF Originator Summary screen may be accessed via the EPAF Forms & Links channel.
No approval button? An approver sees an EPAF in the queue but can't approve it because there is no approval button on his screen.	The originator likely saved the EPAF but did not submit it. Sending an EPAF for approval requires a Save AND Submit.
I have error messages on the Establish Primary Job PRIMJB EPAF (ZZPRIM).	Error messages on this EPAF can be ignored. Just save and submit.
I do not know what values to change on the Establish Primary Job PRIMJB EPAF (ZZPRIM).	There are NO values to change on this EPAF after loading ZZPRIM with a 00 suffix. Save and submit the EPAF as is.
When I load an EPAF for a work study assignment, what do I do differently?	<p>Two main things: after clicking "All Jobs," look for a previous assignment using that GW position number that used a suffix of 00. If you find one, select that line item on the right and click Go, rather than entering the position number and suffix on the top line. Then, once on the EPAF itself, the Job Begin Date field uses the original date from the Current Values column—not the assignment begin date from your E-contract gridline.</p> <p>If the GA has never been in a Work Study position before, then you enter the position number and suffix on the top line as usual.</p>
I entered a position number and suffix but they were rejected.	Position numbers always have six characters; suffix numbers always have two characters. Leading zeroes must be included. (Example: position number 001234 suffix 00)

Issue	Solution
How do I know if my EPAF has been approved? How do I know if it has been applied?	Check the status column under your EPAF Originator Summary link. A status of “Approved” or “Overridden” indicates that the Graduate School has approved the EPAF, but it has yet to be applied to the system by Human Resources. A status of “Completed” indicates that all approvals have been obtained and that HR has applied the EPAF.
My EPAF contained errors, and when I correct them and try to resubmit, I get more errors.	The system sometimes deletes information from fields you DID complete correctly the first time when you have errors elsewhere. Be sure to recheck all fields before resubmitting rather than just the fields that contained errors.
My EPAF was returned for correction, but I don't know why.	The reason your EPAF was returned will always be listed in the Comments section of the EPAF. The comments section is located at the bottom of the full EPAF.
My EPAF gave me an error that the Fund or Index number was invalid. What does this mean and what do I do to fix it?	The issue stems from the fact that your fund or index expires prior to the end of the assignment you are trying to enter. This is a Grants & Contracts or Financial Planning issue. Contact the appropriate office and resolve that issue prior to trying to enter an EPAF. For best results, void the EPAF that you received errors on and start a new one.
I started an EPAF but realized halfway through that I used the wrong position and/or suffix number. Can I just hit the back button and change to the correct position/suffix number?	No. Return to the main EPAF menu and start again. If you have saved the incorrect EPAF, be sure to delete it.
I realized that I select the wrong year on the dropdown boxes on my E-Contract but the student has already accepted it and the EPAF can be entered with correct dates. Do I need to go back and change the E-Contract?	If the E-Contract date changes were simple typos and the student is aware of this, then just make a note in the Comments field on the EPAF noting this discrepancy.
I am getting an EPAF error that says “Date cannot be after the Base Job End Date.”	You have selected a suffix number that has already been used. Start over and increment up by one from the most recent position number. (NOTE: This does not apply to Work Study positions.)

Issue	Solution
<p>The individual I listed as my departmental approver is now unavailable and my EPAF has to be approved immediately. Can someone else approve on their behalf?</p>	<p>Proxies are not used in the U of M's EPAF system. However, an originator can return an EPAF to his/herself for correction and change the approver's username. Access the EPAF Originator Summary, History, and then Update/Return for Correction. Make the change and re-save and re-submit.</p>
<p>When I click Create New PAF, I get an error message that says, "This page is not enabled for current user role(s). bwpkepaf.P_ChoosePerson." What does this mean and how to I fix it?</p>	<p>This means the person trying to originate the EPAF does not have system access. Please complete the access form and check "EPAF Originator." Please allow for processing time after submitting your request.</p>