

Originating an
Electronic Personnel
Action Form
(EPAFs)



Assign a Job/New Hire
with Split Funds
For Graduate Assistants

- Before beginning to work
 - Every new employee must be entered into Banner.
 - Every new employee must be assigned a position (job).
- 1st Step for new employees
 - Have employee go to Human Resources (HR) to complete their new hire paperwork. HR will then enter them into Banner.
- Next Step
 - Originate (create) an **EPAF** to assign the Graduate Assistant Employee a position.
 - To originate the EPAF you will need to know:
 - The position number
 - If the position is paid by the Graduate Office, contact your UBO for a position number
 - If the position is paid from your department funds or a grant, contact Human Resources and they can provide the position number(s) for you.
 - The position number will always begin with G
 - The start date and the end date
 - The number of hours the employee will be paid per pay period
 - The annual salary the employee will be paid
 - The Timesheet Organization (T-Org) of the employee's time approver
 - The city and the state where the employee will work


Originating the EPAF


1. Log into BengalWeb (Pantheraweb for testing), click on Employees, click on EPAF.
 2. Click on Create New PAF.
 3. Enter the employee's 9 digit ISU ID#. (If you don't know their ID#, click on the magnifying glass search icon. Enter the First and Last Name then click on GO. The employee's name will appear, along with their Banner ID#. Click on the ID.)
 4. Change the Query Date to the Effective Date.
 - The Effective Date will be the beginning date the employees will start accumulating pay.
 - Please refer to Idaho State University Contract & Payroll Dates for most effective, personnel, and begin dates.
 - The Contract and Payroll Dates can be found at <http://www2.isu.edu/finserv/ContractPayrollDatesFY2018-19.pdf>
 6. Graduate Assistants - Nine-Month Appointment (20 Paydates)
 - a. Appointment Dates: August 12, 2018 through May 4, 2019
 - b. Payroll Dates: July 29, 2018 (pd. 8/24) - May 4, 2019 (pd. 5/17)
 7. Graduate Assistants - First Semester Appointment ONLY (10 Paydates)
 - a. Appointment Dates: August 12, 2018 through December 15, 2018
 - b. Payroll Dates: July 29, 2018 (pd. 8/24) - December 15, 2018 (pd. 12/28)
 8. Graduate Assistants - Second Semester Appointment ONLY (10 Paydates)
 - a. Appointment Dates: December 30, 2018 through May 4, 2019
 - b. Payroll Dates: December 30, 2018 (pd. 1/25/19) - May 4, 2019 (pd. 5/17)
- The current payroll calendar can be found at <http://www2.isu.edu/finserv/payroll.shtml>

5. To select the Approval Category, click on the drop down arrow and select the EPAF Approval Category GSASLD, then click GO.

ID: *  

Query Date: MM/DD/YYYY*


Approval Category: * 


 There are no active jobs based on the Query Date.

- On the New Job line, enter the position number and the suffix. Click on Go. If you do not know the position number, please contact the Graduate Office or Human Resources.


ID: Lancelot Du Lac, 001462589
Query Date: Jul 29, 2018
Approval Category: Grad Asst New Job w Split Fnd, GRASLD


Graduate Assistant Assign a New Job With Multiple Funds, GRASLD

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job	G10462	00	Graduate Assistant AGSC04	370000, Graduate School					<input checked="" type="radio"/>

 There are no active jobs based on the Query Date.

- Click Save. This will assign a transaction number to the EPAF.

 Your change was saved successfully.

 Enter the information for the EPAF and either Save or Submit

Name and ID: Lancelot Du Lac, 001462589
Transaction: 48158 **Query Date:** Jul 29, 2018
Transaction Status: Waiting
Approval Category: Graduate Assistant Assign a New Job with Split Funds, GRASLD

8. Fill in the blank fields under New Value.

- Job begin Date: Same as Effective Date unless they have held this position in the past. If they have held the position in the past, it will be the original Job Begin Date.
- Effective Date: The date they will start accumulating pay.
- Personnel Date: The date the employee begins work.
- Skip the 'Not Enterable' fields.
- The FTE is .48.
- The Factor and Pays are the total number of Pay Periods the Employee will get paid.
- The Hours per Pay are the number of hours the employee will get paid per Pay Period.
- Enter the Annual Salary. Banner will calculate the Regular Rate and Assign Salary.

Graduate Assistant Assign a New Job With Multiple Funds, G10462-00 Graduate Assistant AGSC04

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		07/29/2018
Contract Type:		Primary
Jobs Effective Date: MM/DD/YYYY*		07/29/2018
Personnel Date: MM/DD/YYYY		08/12/2018
Job Status: (Not Enterable)		A
FTE:		.48
Job Change Reason: (Not Enterable)		HIRE
Salary Group: (Not Enterable)		2018
Step: *(Not Enterable)		0
Factor:		20
Pays:		20
Hours per Pay:		38
Regular Rate:		
Assign Salary:		
Annual Salary:		16454.00

8. Fill in the blank fields cont.

- Title: Enter a position description.
- Timesheet Orgn: Type in the T-Org assigned to the person who will supervise the employee.
- Time Entry Method: the Time Entry Method will default to P for Payroll.
- Location: Select the actual location where the employee will be working. If you do not see the location on the drop down list, please contact Human Resources.

9. Click Save

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		<input type="text" value="07/29/2018"/>
Contract Type:		<input type="text" value="Primary"/>
Jobs Effective Date: MM/DD/YYYY*		<input type="text" value="07/29/2018"/>
Personnel Date: MM/DD/YYYY		<input type="text" value="08/12/2018"/>
Job Status: (Not Enterable)		<input type="text" value="A"/>
FTE:		<input type="text" value=".48"/>
Job Change Reason: (Not Enterable)		<input type="text" value="HIRE"/>
Salary Group: (Not Enterable)		<input type="text" value="2018"/>
Step: *(Not Enterable)		<input type="text" value="0"/>
Factor:		<input type="text" value="20"/>
Pays:		<input type="text" value="20"/>
Hours per Pay:		<input type="text" value="38"/>
Regular Rate:		<input type="text"/>
Assign Salary:		<input type="text"/>
Annual Salary:		<input type="text" value="16454.00"/>
Title:		<input type="text" value="GA Bug Counter AGSC04/RRES57"/>
Timesheet Orgn: *		<input type="text" value="T079"/>
Time Entry Method: (Not Enterable)		<input type="text" value="P"/>
Location Code:		<input type="text" value="IDPOC, Idaho, Pocatello"/>

10. Labor Distribution Section.

- Enter 9 number COA
- Enter the Additional Index(s) in the labor distribution section.
- Enter 6202 under Account
- Change the percent. The percent can be several decimal places if necessary.
- The total percent must add up to 100%
- Click Save

Current

Effective Date: 07/29/2018

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
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New

Effective Date: MM/DD/YYYY 07/29/2018

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date	Remove
9	AGSC04	110000	370004	6202	01INS					80.00				<input type="checkbox"/>
9	RRES57	220262	600000	6202	04ORO					20.00				<input type="checkbox"/>
										Total:	100.00			

Default from Index Save and Add New Rows

11. Termination Section

- The default termination date will be the end of the academic year. If their termination will be at any other time, please change it here.
- Skip Change Reason and Job Status.
- In the next section under New Value, enter the effective date from the Job Assign section.
- Change Earnings to GTA
- Enter the value from Hours per Pay above under Hours or Units Per Pay
- Enter the Termination Effective Date + 1 day under End Date.

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*		05/04/2019
Job Change Reason: *(Not Enterable)		TERM
Job Status: *(Not Enterable)		T

Current									
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date			
New Value									
Effective Date	MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date	MM/DD/YYYY	Remove
07/29/2018		GTA, Graduate Assistantship	38.00			1	05/05/2019		<input type="checkbox"/>
		Not Selected				1			

12. Fill in the mandatory Approval Levels in the routing queue. Enter the appropriate EPAF approver's "4x4" (first part of their email) under User Name. You may add additional Approvals if you need to.


- 10 – EPAF Appro Authority HR Action will always be THOMKIM2.
- 21 – EPAF Department FYI HR Action will be someone from your area who has been designated as an EPAF FYI.
- 23 - EPAF Dept Appro Authority will be someone from your area who has been designated as an EPAF approver.
- 25 – EPAF Grad Appro Authority will be EAKIAMAN.
- 30 - EPAF GRAD UBO HR Action will be GERBDEBR.
- 31 – EPAF UBO HR Action will be your UBO.
- 41 – EPAF Dean/Unit Appro HR Action will be your Dean or Approval Authority
- 61 – EPAF Financial Aid Office will be FINNJODY
- 71 – EPAF Payroll FYI will be ROMEJANI
- 75 - EPAF Payroll FYI 2 will be BLOXDEBR
- 101 – EPAF HR Data Apply will always be HAMMKAT3.

Routing Queue

Approval Level	User Name	Required Action	Remove
10 - (HRCONS) EPAF Appro Authority Hr Action	<input type="text" value="THOMKIM2"/> Kimberly Thompson	Approve	<input type="checkbox"/>
21 - (HRDFYI) EPAF Department FYI HR Action	<input type="text" value="BURKSTEP"/> Stephanie Michelle Richardson	FYI	<input type="checkbox"/>
23 - (HRAPPR) EPAF Dept Appro Authority	<input type="text" value="LUDWRAY"/> Ray L Ludwig	Approve	<input type="checkbox"/>
25 - (HRGRAD) EPAF Grad Appro Authority	<input type="text" value="EAKIAMAN"/> Amanda Eakins	Approve	<input type="checkbox"/>
30 - (HRGUBO) EPAF GRAD UBO HR Action	<input type="text" value="GERBDEBR"/> Debra Gerber	Approve	<input type="checkbox"/>
31 - (HRUBO) EPAF UBO HR Action	<input type="text" value="DANGANGI"/> Angie Kae Dangerfield	Approve	<input type="checkbox"/>
41 - (HRDEAN) EPAF Dean/Unit Appro HR Action	<input type="text" value="AMESDAN2"/> Daniel Ames	Approve	<input type="checkbox"/>
61 - (HRSFYI) EPAF Financial Aid Office FYI	<input type="text" value="FINNJODY"/> Jody L Finnegan	FYI	<input type="checkbox"/>
71 - (HRPFYI) EPAF Payroll FYI	<input type="text" value="ROMEJANI"/> Janice L. Romero	FYI	<input type="checkbox"/>
75 - (HRPAYF) EPAF Payroll FYI 2	<input type="text" value="BLOXDEBB"/> Debra A Bloxham	FYI	<input type="checkbox"/>
101 - (HRDATA) EPAF HR Data Apply	<input type="text" value="HAMMKAT3"/> Katie Joy Hammond	Apply	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>

13. Enter Comments. Comments are mandatory for Grad Employees. Please enter whether the employee will be working the Academic Year, Fall Semester, Spring Semester, or Fiscal Year. If they employee's start dates and end dates are not the Academic Year, Fall Semester, Spring Semester, or Fiscal Year, please specify the start and end dates with a brief note. Also enter the Scholarship Index or indicate there is no scholarship, whichever is applicable
14. Click Save, Click Submit. Warnings are okay, Errors need to be corrected. If the EPAF is successfully submitted, the status will change from 'Waiting' to 'Pending' and the EPAF will be in the first approver's queue.
15. To view the EPAF click on EPAF Originator Summary from the EPAF menu. If there are errors, the EPAF will have a status of waiting and appear under the Current tab. The errors will need to be corrected.
16. If the EPAF was successfully submitted, the status will change to pending and it can be found under the History tab. Click on the name to see whose queue the EPAF is in. Once the EPAF has been completely approved and applied the status will change to 'Completed'.

Current **History**

 Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

Transaction Status:
All
Completed
Go

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EPAF Transactions

▲ Name ▼	▲ ID ▼	▲ Transaction ▼	▲ Type of Change ▼	▲ Submitted Date ▼	▲ Effective Date ▼	▲ Transaction Status ▼
Du Lac, Lancelot Graduate Assistant AGSC04, G10462-00	001462589	48158	Graduate Assistant Assign a New Job with Split Funds	Jun 06, 2018	Jul 29, 2018	Pending