EPAF End User Guide

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N Northeastern University
Human Resources

What is an EPAF?

- EPAF stands for Electronic Personnel Action Form
- It is a Banner tool used for routing transactions
- EPAFs are used for Part-Time Lecturer hires, both new and rehires

How to Access EPAFs

1. To access EPAFs, log into your myNortheastern account and click on the Services & Links tab
2. Under the HRM Benefits and Services box, click Employee Self-Service
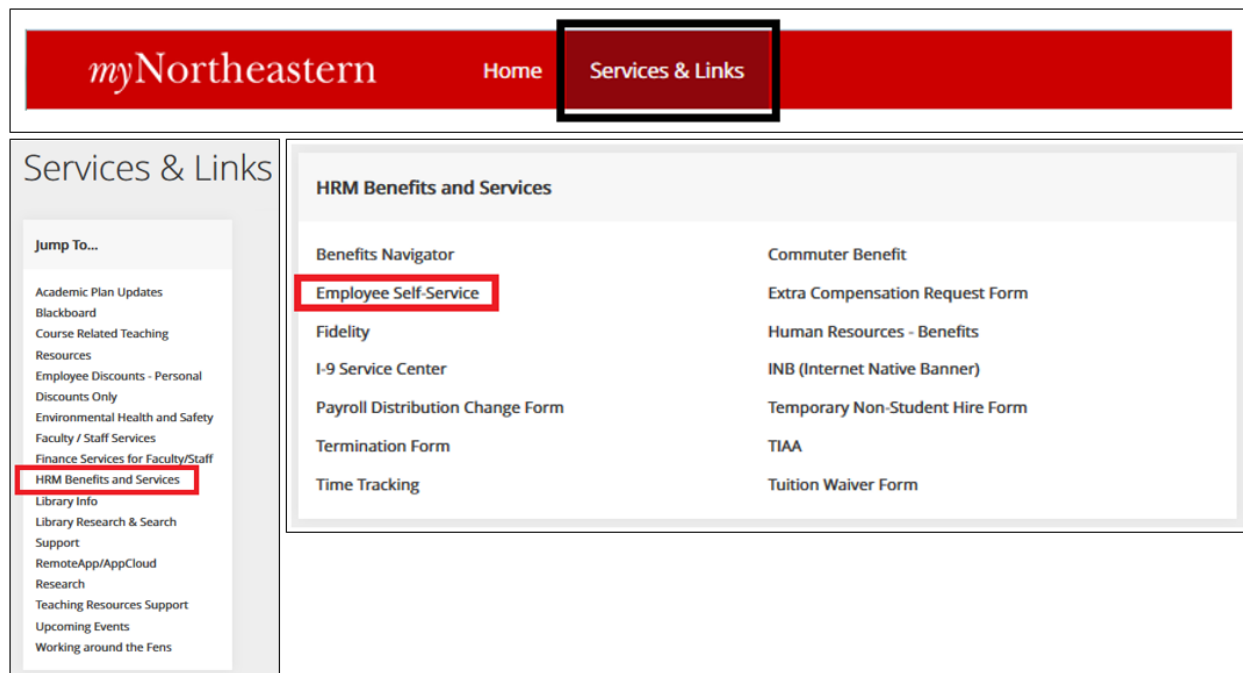
3. Once in Employee Self Service, click the Employee tab
4. Click on Electronic Personnel Action Forms
   o This will bring you to the main EPAF menu

Personal Information	Student Services	**Employee**

Search [＿＿＿＿＿＿＿] [Go]

Employee

Electronic Personnel Action Forms

Update Tax Information

Pay Information
Direct deposit allocation, earnings and deductions history, or pay stubs.

W-2 Wage and Tax Statement
W-2 Wage and Tax Statement

Salary Planner

Annual Benefits Statement

Employee Directory

Jobs Summary

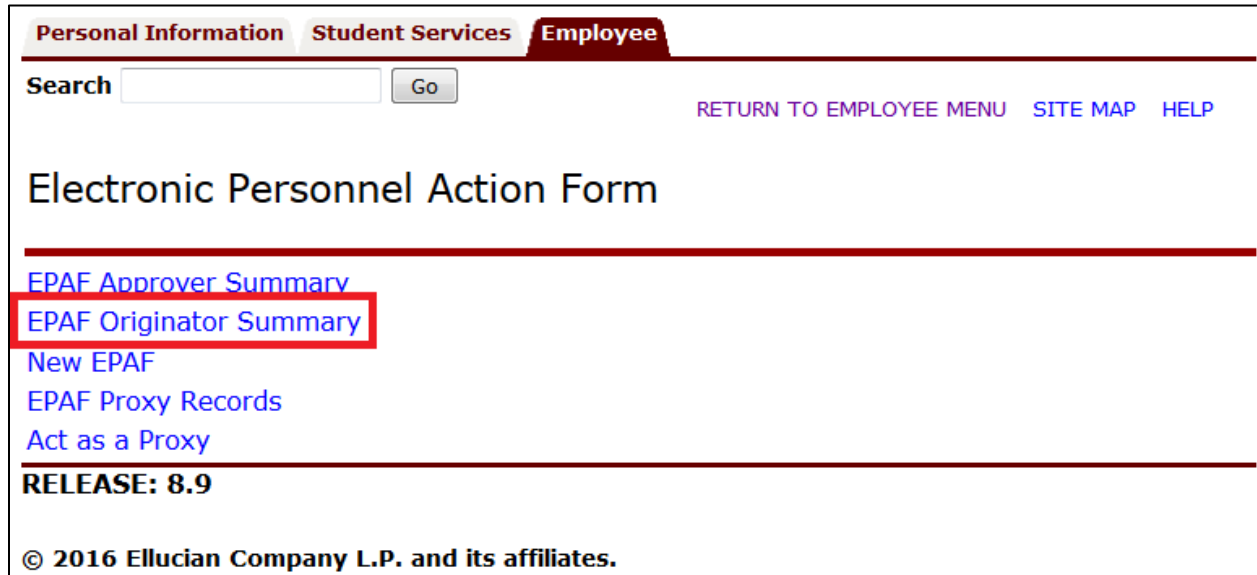**Temporary Non-Student Sick Time Balance**

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Setting Up or Updating Your Default Routing Queue

- The routing queue will direct the EPAF to the appropriate approvers (Initiator – Key Contact – HR Operations – the Dean – Superuser/Apply)
- Before creating an EPAF for the first time, you should set up your default routing queue
  - You will only need to set this up once as the changes made here will be your defaults for all future EPAFs
1. From the main EPAF menu, click on EPAF Originator Summary

Personal Information	Student Services	**Employee**

Search [   ] [Go]

RETURN TO EMPLOYEE MENU   SITE MAP   HELP

Electronic Personnel Action Form

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

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2. Click on the Default Routing Queue link
  - If there are EPAFs showing on this page, the Default Routing Queue link can be found at the bottom of the page

3. Change the approval category to Create Job for New Position Number and Suffix, FPNJOB.
4. Set up the approval levels as shown below
   - Key Contact first, then HR Operations, the Dean, and finally Superuser/Apply.
5. Set up the Required Action as shown below
   - Approve, Approve, FYI, and Apply

6. Fill in the appropriate user for each Approval level
   - Click on the magnifying glass to search for approvers; this will open a new window.
   - Select the employee's name you wish to add and click the Select button. If you are unsure who to add reach out to your HR Operations contact.

Valid Values

Search: [   ] [Go]

**User Names,
99 - Superuser / Apply**

Candido, Megan R. (N001665210)
Cushman, Judith (N000572378)
Dajko, Esmeralda (N001698546)
Daoudi Nejm, Sahar (N001640659)
Foldvary, Stephanie (N001641909)
Mottern, Alexandra P. (N000423143)
Munir, Aneeza (N001799560)
Regan, Clare S. (N000148985)
Clauss, Jason (N001215210)

[Select]

Exit Window

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- o This will populate the employee's User Name, as shown below.

Approval Queue

Approval Level	User Name	
15 - (KEYCON) Key Contact	🔍	
20 - (HROPS) HR Operations	🔍	
80 - (DEAN) Dean	🔍	
99 - (APPLY) Superuser / Apply	🔍 N000148985	Clare Sandra Regan

[Save and Add New Rows]

EPAF Originator Summary

Return to EPAF Menu

7. Once you've added all of the appropriate users, click the Save and Add New Rows button to save your default routing queue
8. After saving the routing queue for new hires, you need to set up the default routing queue for rehires as well
   - o Return to step 3, but select Reactivate Job for Exisiting Position Number, FPRJOB as the Approval Category.

- o The only difference in the routing queue set up is that the Dean's Required action should be set to *Approve*, not FYI (shown below)

- o Continue through the rest of the steps as indicated
9. Once completed, click the Return to EPAF Menu link at the bottom of the page to return to the main EPAF Menu
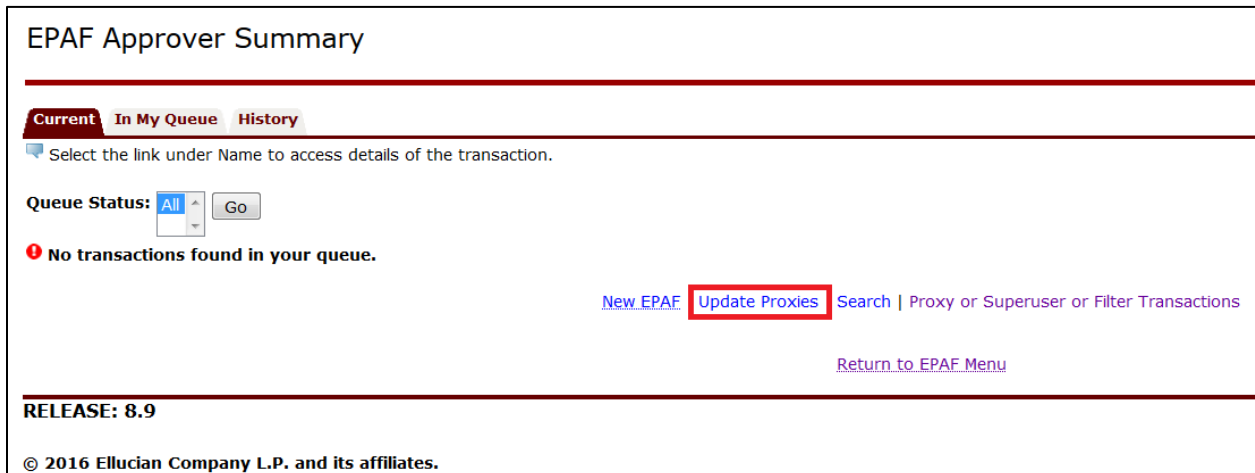
Adding and Removing a Proxy User

1. A proxy user is someone who has permissions to approve EPAFs on your behalf
2. You cannot act as a proxy for another user until that user has added you to their own list of proxies
3. To set up a proxy user, go to the main EPAF menu
4. Click on EPAF Approver Summary

Personal Information	Student Services	**Employee**

Search [_____] [Go]

RETURN TO EMPLOYEE MENU   SITE MAP   HELP

Electronic Personnel Action Form

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5. Click on the Update Proxies link at the bottom of the screen.
   o If you have any EPAFs pending your review/approval, this link will be below these

EPAF Approver Summary

Current	In My Queue	History

Select the link under Name to access details of the transaction.

Queue Status: [All] [Go]

🛇 **No transactions found in your queue.**

New EPAF   Update Proxies   Search | Proxy or Superuser or Filter Transactions

Return to EPAF Menu

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6. Select the appropriate Approval Level in the dropdown menu (most commonly Key Contact or Dean). Click the Go button.

7. This page shows any existing proxy users. To add a new user, use the drop down menu to select an employee's name.
8. Tick the corressponding box under the Add column and click the Save button.
   o If you do not see a user in the dropdown menu, that individual does not have access to EPAFs. A Banner Access form will need to be submitted to HRIS
     ▪ http://www.northeastern.edu/hrm/pdfs/resources/employment/BannerHR_System_Access_Request_Form_17MAY2016.pdf

9. After clicking save, you can see that the user selected has moved to the list of proxies.
10. If you wish to remove any users from your proxy list, tick the corresponding box under the Remove column and click Save.

Search [_____] Go

EPAF Proxy Records

Approval Level: HR Operations, HROPS ▼ Go

Name	Remove	Add
Candido, Megan R. (N001665210)	☐	
Dajko, Esmeralda (N001698546)	☐	
Mottern, Alexandra P. (N000423143)	☐	
Regan, Clare S. (N000148985)	☑	
Not Selected ▼		☐

Save

EPAF Approver Summary

Return to EPAF Menu

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10
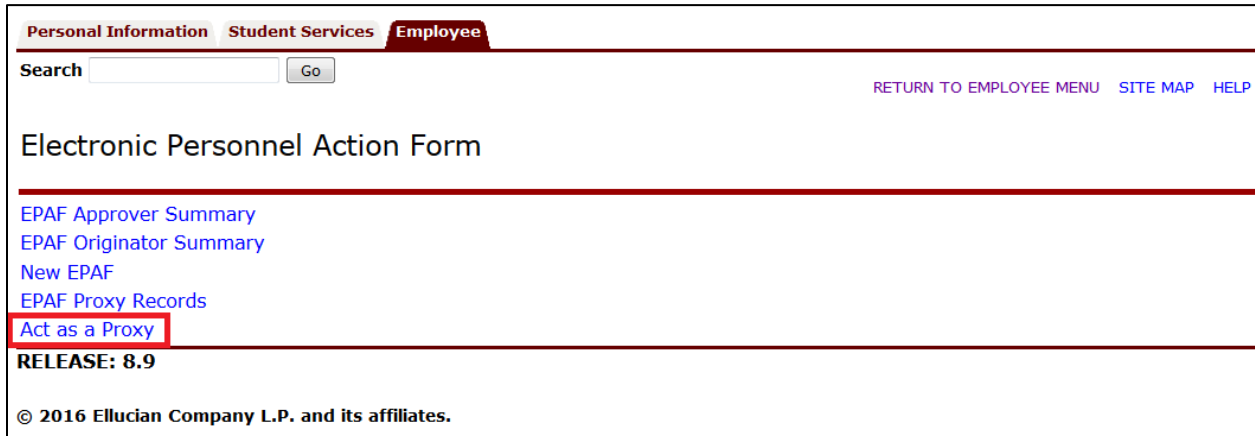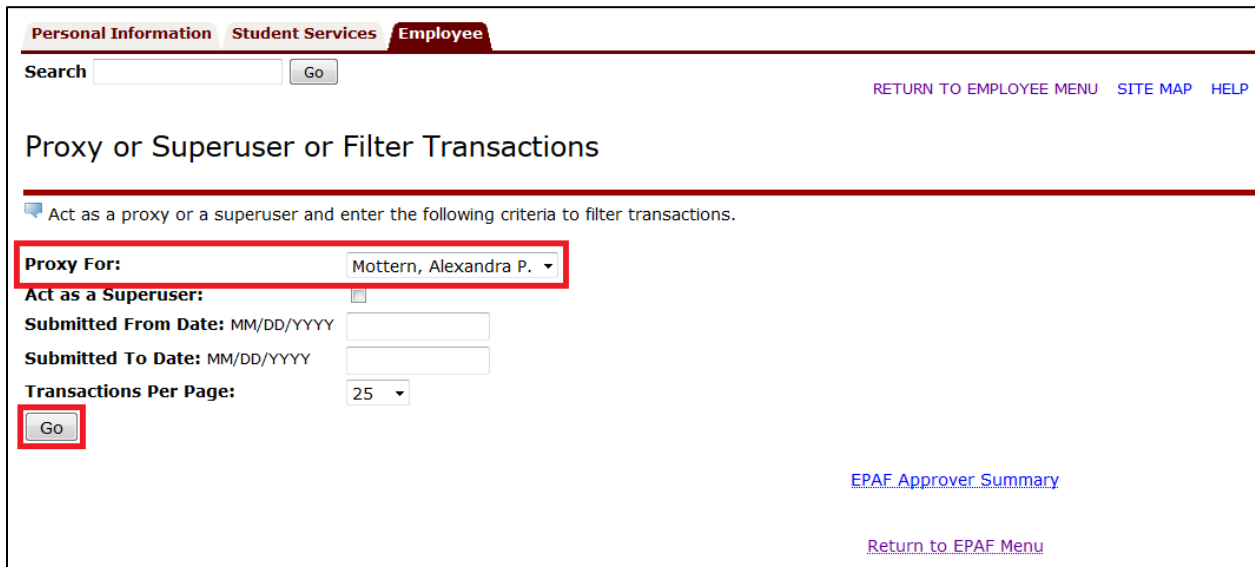
Acting as a Proxy User

1. To act as a proxy for another user, go to the main EPAF menu and click Act as a Proxy.

Personal Information **Student Services** **Employee**

Search [_____] [Go]

RETURN TO EMPLOYEE MENU   SITE MAP   HELP

Electronic Personnel Action Form

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2. Select the user you wish to proxy for by using the dropdown menu. Click the Go button.
   o If you choose Self, you will be directed to your own Approval Summary

Personal Information **Student Services** **Employee**

Search [_____] [Go]

RETURN TO EMPLOYEE MENU   SITE MAP   HELP

Proxy or Superuser or Filter Transactions

💬 Act as a proxy or a superuser and enter the following criteria to filter transactions.

Proxy For: Mottern, Alexandra P. ▾
Act as a Superuser: ☐
Submitted From Date: MM/DD/YYYY   [_____]
Submitted To Date: MM/DD/YYYY   [_____]
Transactions Per Page: 25 ▾
[Go]

EPAF Approver Summary

Return to EPAF Menu

3. You are now viewing the selected individual's Approver Summary.
4. Click on the appropriate employee's name to view the EPAF details and approve.

EPAF Approver Summary

Current | In My Queue | History

💬 Select the link under Name to access details of the transaction.

✔ Filtering On

Queue Status: [All / More Information] [Go]

New EPAF | Update Proxies | Search | Proxy or Superuser or Filter Transactions

Return to EPAF Menu

[Select All] [Reset] [Save]

1 - 1 of 1
Jump to Bottom

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
EMPLOYEE NAME Part-Time Lecturer, 800011-01	▮	89994	Reactivate Job for Existing Position Number	Sep 29, 2016	Sep 28, 2016	Approve		Comments

1 - 1 of 1
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Creating an EPAF for a New Position Number and Suffix (FPNJOB)

- Use this approval category for:
    - Individuals who are new to the University
    - Hiring an individual into a position they have not been hired into before
- Before creating an EPAF for an individual who is new to the University, ensure that they have already been hired through PeopleAdmin
    - Skipping this step will delay the hiring process as Operations will not approve the EPAF until this is completed
1. Go to the main EPAF menu and click New EPAF

Personal Information	Student Services	Employee
Search [ ] [Go]		RETURN TO EMPLOYEE MENU SITE MAP HELP

Electronic Personnel Action Form

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2. Enter the employee's NUID and tab over, their name will populate
3. Enter the Query Date (it automatically populate with today's date)
    - **You must use the 1st or the 16th of the month for the query date**
        - This will match the job effective date entered on the EPAF Preview in a future step
        - To determine if the query date should be the 1st or the 16th, check the EPAF payroll deadlines on the HRM website.
4. Change the Approval Category to Create Job for New Position Number and Suffix, FPNJOB
5. After chosing the Approval Category, the employee's active jobs (as of the query date entered) will appear below.
    - If there are no active jobs on the query date entered, no jobs will appear
6. Click the All Jobs button to view the Employee Job Assignments table.

* - indicates a required field.

ID: * [redacted] [redacted] 👤 🔍

Query Date: MM/DD/YYYY* 01/01/2017
Approval Category: * Create Job for New Position Number and Suffix, FPNJOB ▾
[Go]

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Secondary	800075	00	Part-Time Lecturer	128120, Writing Program	Sep 01, 2014	Jan 15, 2018	Jan 15, 2018	Active

[All Jobs]

7. The Employee Job Assignments table with populate, showing all of the positions the employee has ever been hired into.
   o **If you see the position number and suffix you wish to use, you *must* change the approval category to Reactivate Job for Existing Position (FPRJOB).** Click here for instructions for Reactiving Job for Existing Position.
      ▪ If you do not change the approval category, you will not be able to submit the EPAF, even after entering all of the information.
8. Once you've confirmed that the employee has never been hired in to the position number and suffix you are using, click Go to continue.

* - indicates a required field.

ID: * [redacted] [redacted] 👤 🔍

Query Date: MM/DD/YYYY* 01/01/2017
Approval Category: * Create Job for New Position Number and Suffix, FPNJOB ▾
[Go]

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Secondary	498990	00	Extra Compensation	129100, English	Jan 16, 2012	Apr 30, 2012	Apr 30, 2012	Terminated
Secondary	502732	00	Part-Time Lecturer	129100, English	Jul 01, 2010	Dec 31, 2013	Dec 31, 2013	Terminated
Secondary	800075	00	Part-Time Lecturer	128120, Writing Program	Sep 01, 2014	Jan 15, 2018	Jan 15, 2018	Active
Primary	800075	01	Part-Time Lecturer	128120, Writing Program	Sep 01, 2016	Apr 30, 2018	Jan 31, 2018	Terminated

[Active Jobs]

9. The new screen will have a blank position and suffix box above the employee's active jobs
   o Enter the position number and suffix and tab over, the Title and Time Sheet Org will populate
10. Click the Go button

Create New Part Time Faculty Job, NFPJOB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job	502002	00	Part-Time Lecturer	131500, Marine and Environmental Sciences					●
	Primary	600960	00	HR Operations Assistant	168100, Human Resources Management	[redacted]		Oct 15, 2016	Active	○

[All Jobs]
[Next Approval Type] [Go]

- You are now viewing the EPAF (EPAF Preview)
11. The Update Employee Record section cannot be edited as it is part of delivered Banner
    - If the Employee Status is terminated, the individual will need to be hired through PeopleAdmin

Update Employee Record

Item	Current Value	New Value
Employee Status: (Not Enterable)	Active	A
Employee Class Code: (Not Enterable)	O7, Office Technical Support 7h	
Home Organization: (Not Enterable)	168100, Human Resources Management	
Distribution Orgn: (Not Enterable)	168100, Human Resources Management	
Current Hire Date: MM/DD/YYYY(Not Enterable)	████████	

12. Under Create New Part Time Faculty Job, the field with red asterisks are required:
    - Job Begin Date: This field must be the 1st or the 16th of the month
        - If the EPAF is on time or early, use the following dates
            - Fall semester: 9/1
            - Spring semester: 1/1
            - Summer 1 and Full Summer semester: 5/1
            - Summer 2 semseter: 7/1
        - **If the EPAF is late and contains retro payment**, you must use the first day of the current pay period. Use the EPAF deadlines, located on the HRM website, as a guideline
        - If you're unsure of which date to use, reach out to your Ops contact directly
    - Contract Type: Select either Primary or Secondary
        - An employee can have only 1 primary position. Keep this in mind if you're creating multiple EPAFs for the same individual for the same time period
    - Job Effective Date: This field **must match** the Job Begin Date
    - Personnel Date: This field is not required, but it is suggested that you use the employee's actual start date/start date of the appointment. This date drives the I-9 for new hires and rehires who have not worked for the university in the past year, if left blank section 1 of the I-9 will be due by the Query/Effective date.
    - Job Change Reason: This field will default to HRNEW and cannot be changed
    - Annual Salary: Enter the total salary amount for the appointment
        - This amount must match the offer letter received by Ops
    - Hours per Day: Typically 1 for Part-Time Lecturer positions
        - For all other positions, it should be the average weekly hours divided by 5
    - Factor: This field is the total number of payments the employee will receive for the appointment.
        - For Fall, Spring, and Full Summer semester appointments, use 8
        - For Summer 1 and Summer 2 semester appointments, use 4
        - For Fall, Winter, Spring, and Full Summer quarter appointments, use 6

- **If the EPAF is late and contains retro payment, DO NOT** adjust the number of pays to make up for this
  - This will cause the individual to be underpaid until the very last payment
- o Pays: This field must be the same number used in the Factor field
- o Contract Number: This is the total number of weeks for the appointment
  - For Fall, Spring, and Full Summer semester appointments, use 16
  - For Summer 1 and Summer 2 semester appointments, use 8
  - For Fall, Winter, Spring, and Full Summer quarter appointments, use 12
  - **If the EPAF is late and contains retro payment**, **DO NOT** adjust the contract number number to make up for this
- o Step: This field cannot be changed; should be 0.
- o Supervisor ID: Enter the NUID of the employee's supervisor
  - The supervisor will be responsible for approving requests in Time Tracking
- o Supervisor Position: Leave this field blank
- o Supervisor Suffix: Leave this field blank

Create New Part Time Faculty Job, 502002-00 Part-Time Lecturer

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		01/01/2017
Contract Type: *		Primary
Jobs Effective Date: MM/DD/YYYY*		01/01/2017
Personnel Date: MM/DD/YYYY		
Job Change Reason: *(Not Enterable)		HRNEW
Annual Salary: *		
Hours per Day: *		
Factor: *		
Pays: *		
Contract Number: *		
Step: *(Not Enterable)		0
Supervisor ID: *		
Supervisor Position:		
Supervisor Suffix:		

13. Double check the funding information, as it defaults from the position used in a previous step
    - o If the index is incorrect, check that the correct position number was used (top right hand corner of the page)
    - o If you need to enter multiple indexes, you can do so here
      - You will not be able to save the EPAF if the percent sum does not total 100
    - o Click the Save and Add New Rows button to save any changes made in this section

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

Current
Effective Date: 01/01/2017
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New
Effective Date: MM/DD/YYYY 01/01/2017

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
🔍 N	🔍 235800	200000	131500	🔍 61040	1010					100.00	
🔍	🔍			🔍							
🔍	🔍			🔍							
🔍	🔍			🔍							
🔍	🔍			🔍							
									Total:	100.00	

✔

[Default from Index] [Save and Add New Rows]

14. Under the Terminate Job section, the fields with red asterisks are required
   o Job Effective Date: This field must be the 15th or the last day of the month
        ▪ If the EPAF is on time or early, use the following dates
            – Fall semester: 12/31
            – Spring semester: 4/30
            – Summer 1 semester: 6/30
            – Summer 2 semseter and Full Summer semester: 8/31
        ▪ **If the EPAF is late and contains retro payment**, **DO NOT** adjust the Job Effective Date to make up for this
        ▪ If you're unsure of which date to use, reach out to your Ops contact directly
    o Personnel Date: This field is not required, but it is suggested that you use the employee's actual end date (or end date of the appointment)
    o Job Status: This field will default to T and cannot be changed
    o Job Change Reason: This field will default to TIAPT and cannot be changed

Terminate Job, 502002-00 Part-Time Lecturer

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY✱		
Personnel Date: MM/DD/YYYY		
Job Status: ✱(Not Enterable)		T
Job Change Reason: ✱(Not Enterable)		TIAPT

15. Under the Compensation Details section, select if the EPAF is for Teaching
    o If Yes:
        ▪ Compensation: Total Compensation for the corresponding CRN
        ▪ CRN: Enter the course reference number that the EPAF is for
            – Click on the Magnifying Glass icon to the right of the CRN field to view courses the individual is connected to
                • You must connect the instructor to the course with the Registrar's Office prior to completing the EPAF

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- You can enter multiple courses on one EPAF if the index number is the same
  - ▪ Term: Enter the six digit term code
    - Click on the Magnifying Glass icon to the right of the CRN field to confirm the term code (6 digit number beginning with the year)
  - ▪ After entering the CRN and Term, click the Save and Add New Rows button and the remaining fields will populate (Subject, Course Number, Course Title, Instructional Method, and Campus)
- o If No:
  - ▪ Compensation: Total Compensation for the non-teaching portion of the Annual Salary previously entered
- o The total Compensation entered in this section must match the Annual Salary previously entered to submit the EPAF

NEU Custom: Compensation Details

Teaching?✱	Compensation✱	CRN	Term	Subject	Course Number	Course Title	Instructional Method	Campus	Remove
Not Selected ▾		🔍							
Not Selected ▾		🔍							
Not Selected ▾		🔍							
Not Selected ▾		🔍							

Save and Add New Rows

16. Under the Routing Queue section, verify that the information populated is correct.
    - o If you did not set up your default routing queue, nothing will populate. Fill in the correct contact for the following Approval Levels:
      1. 15 – (KEYCON) Key Contact
         - Required Action: Approve
      2. 20 – (HROPS) HR Operations
         - Required Action: Approve
      3. 80 – (DEAN) Dean
         - Required Action: FYI
      4. 99 – (APPLY) Superuser/Apply
         - Required Action: Apply
    - o If incorrect, choose the appropriate user by click on the magnifying glass next to the corresponding Approval Level. Click the Save and Add New Rows button after you've made your changes.

Routing Queue

Approval Level	User Name		Required Action
15 - (KEYCON) Key Contact	🔍 ███████	███████	Approve
20 - (HROPS) HR Operations	🔍 N001641909	Stephanie Foldvary	Approve
80 - (DEAN) Dean	🔍	███████	FYI
99 - (APPLY) Superuser / Apply	🔍 N000148985	Clare Sandra Regan	Apply
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected

Save and Add New Rows

Comment

Approval Types | Account Distribution | Routing Queue | Comments | Transaction History

Save
Return to Top

New EPAF | EPAF Originator Summary

17. Click the Save button at the bottom of the page
   o Review any errors or warning messages received, correct the EPAF, and click the Save button
      ▪ Use the guide on the HRM website if you're unsure of how to correct an error (http://www.northeastern.edu/hrm/pdfs/hr-payroll/epaf_warning_errors.pdf)
18. Click the Submit button
   o This will send the EPAF to the individual listed as the Key Contact approver

Creating an EPAF to Reactivate Job for Exisiting Position (FPRJOB)

- Use this approval category when you are using a position number and suffix combination that the individual has previously been hired into
  - **You will not necessarily use this approval category for all FP rehires**
1. Go to the main EPAF menu and click New EPAF

2. Enter the employee's NUID and tab over, their name will populate
3. Enter the Query Date (it automatically populate with today's date)
   - You will always use the 1st or the 16th of the month for the query date
     - This will match the job effective date entered on the EPAF Preview in a future step
4. Change the Approval Category to Reactive Job for Existing Position, FPRJOB
5. After chosing the Approval Category, the employee's active jobs (as of the query date entered) will appear below.
   - If there are no active jobs on the query date entered, no jobs will appear
6. Click the All Jobs button to view the Employee Job Assignments table.

7. The Employee Job Assignments table will populate, showing all of the positions the employee has ever been hired into.
   - **If you see the position number and suffix you wish to use with an end date equal to or after the termination date you plan to use, you must make the following changes:**

- Use a different the suffix number (the next sequential number)
  - If you do not change the suffix number, the EPAF you create will overwrite the current job, causing the pay to be wrong.
- Change the approval category to Create New Job for New Position Number and Suffix (FPNJOB). Click here for instructions on how to continue.
  - If you do not change the approval category, you will not be able to submit the EPAF, even after entering all of the information.

8. Once you've confirmed the position number and suffix you will use are not new to the employee, click Go to continue.

✱ - indicates a required field.

ID: ✱ [▊▊▊▊] [▊▊▊▊]

Query Date: MM/DD/YYYY✱ 01/01/2017
Approval Category: ✱ Reactivate Job for Existing Position Number, FPRJOB ▾

[Go]

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Secondary	498990	00	Extra Compensation	129100, English	Jan 16, 2012	Apr 30, 2012	Apr 30, 2012	Terminated
Secondary	502732	00	Part-Time Lecturer	129100, English	Jul 01, 2010	Dec 31, 2013	Dec 31, 2013	Terminated
Secondary	800075	00	Part-Time Lecturer	128120, Writing Program	Sep 01, 2014	Jan 15, 2018	Jan 15, 2018	Active
Primary	800075	01	Part-Time Lecturer	128120, Writing Program	Sep 01, 2016	Apr 30, 2018	Jan 31, 2018	Terminated

[Active Jobs]

9. The new screen will have a blank position and suffix box above the employee's active jobs
   - Enter the position number and suffix and tab over, the Title and Time Sheet Org will populate
10. Click the Go button

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

ID: [▊▊▊▊]
Query Date: Jan 01, 2017
Approval Category: Part Time Faculty Reactivate, FPRJOB

Update Existing Part Time Faculty Job, UFPJOB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									○
	Secondary	800075	00	Part-Time Lecturer	128120, Writing Program	Sep 01, 2014	Jan 15, 2018	Jan 15, 2018	Active	◉

[All Jobs]
[Next Approval Type] [Go]

- You are now viewing the EPAF (EPAF Preview)
11. The Update Employee Record section cannot be edited as it is part of delivered Banner
   - If the Employee Status is terminated, the individual will need to be hired through PeopleAdmin

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Update Employee Record

Item	Current Value	New Value
Employee Status: (Not Enterable)	Active	A
Employee Class Code: (Not Enterable)	O7, Office Technical Support 7h	
Home Organization: (Not Enterable)	168100, Human Resources Management	
Distribution Orgn: (Not Enterable)	168100, Human Resources Management	
Current Hire Date: MM/DD/YYYY(Not Enterable)	▮▮▮▮▮▮▮	

12. Under Create New Part Time Faculty Job, the field with red asterisks are required:
    - Job Begin Date: This field must be the 1st or the 16th of the month
        - If the EPAF is on time or early, use the following dates
            - Fall semester: 9/1
            - Spring semester: 1/1
            - Summer 1 and Full Summer semester: 5/1
            - Summer 2 semseter: 7/1
        - **If the EPAF is late and contains retro payment**, you must use the first day of the current pay period. Use the EPAF deadlines, located on the HRM website, as a guideline
        - If you're unsure of which date to use, reach out to your Ops contact directly
    - Contract Type: Select either Primary or Secondary
        - An employee can have only 1 primary position. Keep this in mind if creating multiple EPAFs for the same individual
    - Job Effective Date: This field **must match** the Job Begin Date
    - Personnel Date: This field is not required, but it is suggested that you use the employee's actual start date (or start date of the appointment) This date drives the I-9 for new hires and rehires who have not worked for the university in the past year, if left blank section 1 of the I-9 will be due by the Query/Effective date.
    - Job Change Reason: This field will default to HRNEW and cannot be changed
    - Annual Salary: Enter the total salary amount for the appointment
        - This amount must match the offer letter received by Ops
    - Hours per Day: Typically 1 for Part-Time Lecturer positions
        - For all other positions, it should be the average weekly hours divided by 5
    - Factor: This field is the total number of payments the employee will receive for the appointment.
        - For Fall, Spring, and Full Summer semester appointments, use 8
        - For Summer 1 and Summer 2 semester appointments, use 4
        - For Fall, Winter, Spring, and Full Summer quarter appointments, use 6
        - **If the EPAF is late and contains retro payment, DO NOT** adjust the pays number to make up for this
            - This will cause the individual to be underpaid until the very last payment
    - Pays: This field must be the same number used in the Factor field
    - Contract Number: This is the total number of weeks for the appointment

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- For Fall, Spring, and Full Summer semester appointments, use 16
- For Summer 1 and Summer 2 semester appointments, use 8
- For Fall, Winter, Spring, and Full Summer quarter appointments, use 12
- **If the EPAF is late and contains retro payment**, **DO NOT** adjust the contract number number to make up for this
  - Step: This field cannot be changed; should be 0.
  - Supervisor ID: Enter the NUID of the employee's supervisor
    - The supervisor will be responsible for approving requests in Time Tracking
  - Supervisor Position: Leave this field blank
  - Supervisor Suffix: Leave this field blank

Create New Part Time Faculty Job, 502002-00 Part-Time Lecturer

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY✱		01/01/2017
Contract Type: ✱		Primary
Jobs Effective Date: MM/DD/YYYY✱		01/01/2017
Personnel Date: MM/DD/YYYY		
Job Change Reason: ✱(Not Enterable)		HRNEW
Annual Salary: ✱		
Hours per Day: ✱		
Factor: ✱		
Pays: ✱		
Contract Number: ✱		
Step: ✱(Not Enterable)		0
Supervisor ID: ✱		
Supervisor Position:		
Supervisor Suffix:		

13. Double check the funding information, as it defaults from the position used in a previous step
    - If the index is incorrect, check that the correct position number was used (top right hand corner of the page)
    - If you need to enter multiple indexes, you can do so here
      - You will not be able to save the EPAF is the percent sum does not enter 100
    - Click the Save and Add New Rows button to save any changes made in this section

Current												
Effective Date: 01/01/2017												
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date												

New												
Effective Date: MM/DD/YYYY 01/01/2017												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	
🔍 N	🔍 235800	200000	131500	🔍 61040	1010					100.00		
🔍	🔍			🔍								
🔍	🔍			🔍								
🔍	🔍			🔍								
🔍	🔍			🔍								
									Total:	100.00		

✔

[Default from Index] [Save and Add New Rows]

14. Under the Terminate Job section, the fields with red asterisks are required
- Job Effective Date: This field must be the 15th or the last day of the month
    - If the EPAF is on time or early, use the following dates
        - Fall semester: 12/31
        - Spring semester: 4/30
        - Summer 1 semester: 6/30
        - Summer 2 semseter and Full Summer semester: 8/31
    - **If the EPAF is late and contains retro payment**, **DO NOT** adjust the Job Effective Date to make up for this
    - If you're unsure of which date to use, reach out to your Ops contact directly
- Personnel Date: This field is not required, but it is suggested that you use the employee's actual end date (or end date of the appointment)
- Job Status: This field will default to T and cannot be changed
- Job Change Reason: This field will default to TIAPT and cannot be changed

Terminate Job, 502002-00 Part-Time Lecturer

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY✱		
Personnel Date: MM/DD/YYYY		
Job Status: ✱(Not Enterable)		T
Job Change Reason: ✱(Not Enterable)		TIAPT

15. Under the Compensation Details section, select if the EPAF is for Teaching
- If Yes:
    - Compensation: Total Compensation for the corresponding CRN
    - CRN: Enter the course reference number that the EPAF is for
        - Click on the Magnifying Glass icon to the right of the CRN field to view courses the individual is connected to
            - You must connect the instructor to the course with the Registrar's Office prior to completing the EPAF

- You can enter multiple courses on one EPAF if the index number is the same
  - **Term**: Enter the six digit term code
    - Click on the Magnifying Glass icon to the right of the CRN field to confirm the term code (6 digit number beginning with the year)
  - After entering the CRN and Term, click the Save and Add New Rows button and the remaining fields will populate (Subject, Course Number, Course Title, Instructional Method, and Campus)
- If No:
  - **Compensation**: Total Compensation for the non-teaching portion of the Annual Salary previously entered
- The total Compensation entered in this section must match the Annual Salary previously entered to submit the EPAF

NEU Custom: Compensation Details

Teaching?✶	Compensation✶	CRN	Term	Subject	Course Number	Course Title	Instructional Method	Campus	Remove
Not Selected ▾		🔍							
Not Selected ▾		🔍							
Not Selected ▾		🔍							
Not Selected ▾		🔍							

Save and Add New Rows

16. Under the Routing Queue section, verify that the information populated is correct.
    - If you did not set up your default routing queue, nothing will populate. Fill in the correct contact for the following Approval Levels:
      1. 15 – (KEYCON) Key Contact
         - Required Action: Approve
      2. 20 – (HROPS) HR Operations
         - Required Action: Approve
      3. 80 – (DEAN) Dean
         - Required Action: FYI
      4. 99 – (APPLY) Superuser/Apply
         - Required Action: Apply
    - If incorrect, choose the appropriate user by click on the magnifying glass next to the corresponding Approval Level. Click the Save and Add New Rows button after you've made your changes.

Routing Queue

Approval Level	User Name		Required Action
15 - (KEYCON) Key Contact	██████████	██████████	Approve
20 - (HROPS) HR Operations	N001641909	Stephanie Foldvary	Approve
80 - (DEAN) Dean		██████████	FYI
99 - (APPLY) Superuser / Apply	N000148985	Clare Sandra Regan	Apply
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected
Not Selected			Not Selected

[Save and Add New Rows]

Comment

Approval Types | Account Distribution | Routing Queue | Comments | Transaction History

[Save]
Return to Top

New EPAF | EPAF Originator Summary

17. Click the Save button at the bottom of the page
    o Review any errors or warning messages received, correct the EPAF, and click the Save button
        ▪ Use the guide on the HRM website if you're unsure of how to correct an error (http://www.northeastern.edu/hrm/pdfs/hr-payroll/epaf_warning_errors.pdf)
18. Click the Submit button
    o This will send the EPAF to the individual listed as the Key Contact approver

Approving an EPAF as a Key Contact

1. To approve as a Key Contact, go to the main EPAF menu and click on EPAF Approver Summary
    o The Approver Summary page will show you any EPAFs that are pending your approval.

2. Click on the appropriate employee name to open the EPAF and view the details.

3. In the EPAF Preview, check that the information provided is correct.
    o You may add any comments necessary by clicking the "Add Comment" button located at the top and bottom of the page.
    o If all of the information is correct, click the "Approve" button located at the top and bottom of the page.
        ▪ This will send the EPAF to HR Operations for approval

- o If changes/corrections are needed, click the "Return for Correction" button located at the top and bottom of the page.
  - This will send the EPAF back to the initiator so that they can make the necessary updates

Personal Information   **Student Services**   **Employee**

Search [   ] Go

RETURN TO EMPLOYEE MENU   SITE MAP   HELP

EPAF Preview

Name and ID: ▮▮▮▮▮▮▮▮▮▮   **Job and Suffix:** 800011-02, Part-Time Lecturer
Transaction: ▮▮▮▮   **Query Date:**   Oct 15, 2016
Transaction Status: Pending   **Last Paid Date:**
Approval Category: Create Job for New Position Number and Suffix, FPNJOB
Next ⊕

[Approve] [Disapprove] [Return for Correction] [More Info]   Add Comment

Approval Types | Account Distribution | Routing Queue | Comments | Transaction History

EPAF Approver Summary

Return to EPAF Menu

4. After approving an EPAF, you must send the signed offer letter to the EPAF inbox (HREPAF@northeastern.edu).
   - o The offer letter should have the NUID and EPAF/Transaction number on it
     - This number can be found at the top of the EPAF Preview
   - o The subject should include the College and EPAF/Transaction number
     - This is helpful for both HR Operations' and your own organization

EPAF Preview

Name and ID: ▮▮▮▮▮▮▮▮▮▮   **Job and Suffix:** 800011-02, Part-Time Lecturer
Transaction: 90099   **Query Date:**   Oct 15, 2016
Transaction Status: Pending   **Last Paid Date:**
Approval Category: Create Job for New Position Number and Suffix, FPNJOB
Next ⊕

[Approve] [Disapprove] [Return for Correction] [More Info]   Add Comment

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Frequently Asked Questions

1. How do I know which suffix to use?
    - Use suffix 00 when the employee <u>is not</u> currently active in the position number that the EPAF is for (or will not be active during the time period you're hiring them for).
    - Suffix 01 is used when the employee <u>is</u> currently active in the position number the EPAF being submitted is for (or will be active during the time period you're hiring them for).
    - If two EPAFs are created with the same position and suffix number that overlap, the new EPAF will overwrite the prior EPAF, causing the employee to be paid incorrectly.
        - For example, position 500200 suffix 00 ends on 4/30, but an extra payment needs to be submitted for this employee beginning 3/31 through 4/30. You would create a new EPAF for position 500200, but use suffix 01.
2. Why does the effective date need to be the 1st or 16th of the month?
    - The effective date drives the individual's pay. If you use a date other than the 1st or the 16th, the full salary amount will not be paid out, resulting in an underpayment.
3. Why does the termination date need to be the 15th or the last day of the month?
    - The effective date drives the individual's pay. If you use a date other than the 15th or the last day of the month, the individual will be overpaid or underpaid.
4. What if I receive late paperwork?
    - Create an EPAF with the next possible query/effective date (1st or 16th). The salary amount and number of pays should not change based on when the paperwork was received. HR Ops will put in a retro payment for any missed pays.
        - For example, you received paperwork on 5/17 for an individual to start 5/11. The EPAF cannot be approved with an effective date of 5/1 per the EPAF deadlines (check the HRM website). So, you will need to use 5/16 as the start date, with the same number of pays as originally intended.
5. What do I do when a course was cancelled, but the EPAF has already been applied?
    - If you're able to access the EPAF, click the Cancel button. <u>This will not stop the payment</u>, so you will need to reach out to your HR Ops contact to cancel the EPAF in Banner as well. If you cannot access the EPAF, your HR Ops contact can cancel it on your behalf.
6. I'm receiving an error message, but I don't understand it.
    - Check the Common EPAF Error Messages and Warnings located on the HRM website (http://www.northeastern.edu/hrm/pdfs/hr-payroll/epaf_warning_errors.pdf).
    - If the error/warning message is not listed, or you need further assistance, please send a screenshot of the EPAF and error message to your HR Ops contact
7. How do I request EPAF access?
    - You will need to fill out a Banner Access form, selecting EPAF
    - The form is located on the HRM website under Resources and Forms – HR Info Systems – Banner "This Form"
        - http://www.northeastern.edu/hrm/pdfs/resources/employment/BannerHR_System_Access_Request_Form_17MAY2016.pdf

**If your question were not answered, feel free to reach out to your HR Operations contact directly