

Graduate Assistant Non-Summer Reappointment EPAF Instruction

Human Resources Applications
265-6549

6/30/06

Grad Reappointment EPAF

- The reappointment EPAF can only be used for graduate assistants (any classification) who, at one time, held a pooled assistantship job in the same classification they are being appointed to for the current period.
- If this is a new job, or a change in classification is being made, units must forward a HR Transaction Checklist to have the job added.
- Grad jobs must use the appropriate grad pooled position. **DO NOT USE THE SUMMER POSITION NUMBER FOR THE fall/spring semesters!**
- If you need to change the labor distribution on the job, you will need to process a Labor Distribution Change EPAF after the reappointment has been applied to Banner.

Before Beginning to Process a Grad Reappointment EPAF, the information below should be determined

- UIN
- Position and Suffix number – use the appropriate grad pooled position (be sure that the grad held the position previously to which you are going to reappoint; otherwise, you will receive an error message only after you complete the entire process and submit the transaction. The error message received is: ***ERROR* The Begin Date and Step must be entered for a new job.**) The error indicates that the employee did not hold that position previously, and you need to go back and select/enter the correct Position and suffix in order to submit the transaction again. If they are being appointed to a new position, a HR Transaction Checklist will need to be completed and forwarded to HR
- Last Paid Date from the Job Detail Record being reappointed
- Effective Date – the date the job is to begin (must be at least the day after the Last Paid Date)
- Personnel Date – will be the same as effective date for initial fall/spring job
- FTE – FTE at which grad will be performing services
- Salary rate for the appropriate service base and FTE
- Enddate – the date the job will end
- Will routing to an Approver be needed before the System applies the EPAF? If so, what is the NETID of the Approver?

Overall Steps for Grad Reappointment EPAF

1. Enter NOAEPAF in the GO TO field on the General Menu
2. Enter UIN, and then click on the Approval Category field (if you tab after entering the UIN, you will be taken to the Position field and will then need to come back to the Approval Category)
3. Approval Category = GRREAP (Approval Type will default with REAPPT when you select GRREAP in the Approval Cat field)
4. Enter Query Date – use a date that falls within the job’s previous appointment period
5. Enter or select Position – be sure to use the appropriate pooled position (**DO NOT** use a summer position for fall/spring reappointments)
6. Click “Next Block”
7. Current Values will default in (if no defaults are indicated in the Current Values, that means there was no active job record at that time either because the wrong position number was used, or the query date needs to be adjusted to reflect a period when the job was held)
8. Enter Job Effective Date = starting date of reappointment
9. Enter Personnel Date = actual starting date of reappointment (should match job effective date unless the reappointment is retroactive)
10. Enter FTE = FTE assistant is providing service (please be sure to enter the field in decimals (ex: 50% should be entered as .5)
11. Enter Annual Salary = be sure to annualize the salary even if you are only reappointing for one semester (monthly salary x 9 or 12)
12. Enter Salary Group = 20XX (dependent on the enddate of the current fiscal year; ex: 2005-06 use 2006; 2006-07, use 2007, etc.)
13. Save

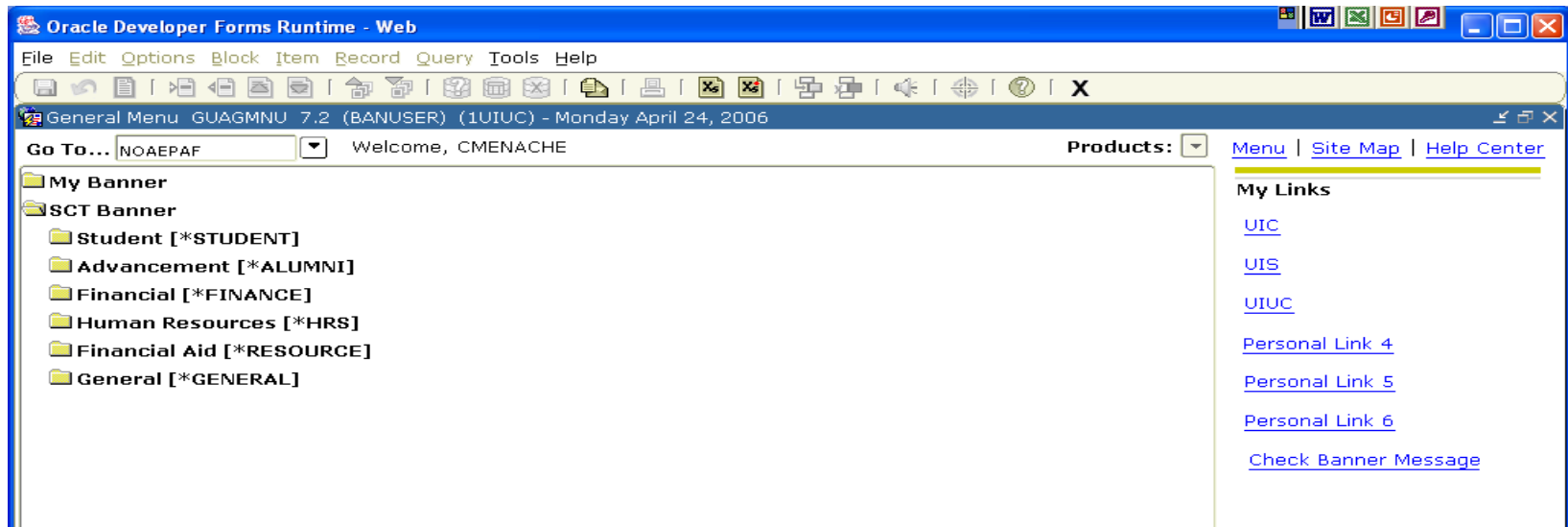
Overall Steps for Grad Reappointment EPAF Data Entry

14. Go to Options from tool bar and select “Next Action”
15. Click “Next Block” to move to New Value fields for the FACPAY section
16. Enter Job Effective date = must match effective date used on the first screen
17. Enter Personnel Date = must match the personnel date used on the first screen
18. Enter Factor = number of months of pay (default is 9, if reappointing a 12 month grad, be sure to change factors to 12)
19. Enter Pays = same number entered in Factor field
20. Enter Hours per Day = FTE x 8
21. Enter Hours per Pay = $173.33 \times \text{FTE}$ (ex: $173.33 \times .5 = 86.665$ – enter 86.67)
22. Save
23. Go to Options, Select “Next Action” to move to enddate job field information
24. Click “Next Block” to get to New Value fields for the End Job section
25. Enter Job Effective Date = date job is to end
26. Enter Personnel Date = same date as effective date
27. Save

Overall Steps for Grad Reappointment EPAF Data Entry

28. Click on Routing Tab to set up Routing or go to Options, select “Routing”
29. Click on drop down arrow below User ID to assign the Central Applier ID
30. Save (Note: if additional routing is required, click on the level code field under the CNTAPL, select the appropriate level code, user id, and required action)
31. Click on Other Information and Comments Tab to add comments
32. Add comments in the Comments text box
33. Save
34. Click on the Transaction Tab
35. Go to Options, Select “Submit Transaction” (if this step is not done, the EPAF will remain in Waiting status, and cannot be approved or applied until the originator Submits the transaction). If you are the Approver, the Transaction Status should reflect “Approved.” If not the approver, the Transaction Status will be “Pending” until the Approver has approved the transaction
36. Check for any Errors/Warnings by going to the Options, and selecting Errors or Warnings Detail Form (errors will prevent the EPAF from moving to the Approver or Applier. Warnings are ignored and will not delay the process. See slide 22-23 for more information)

Grad Reappointment EPAF



To access the Graduate Assistant Reappointment EPAF, type NOAEPAF in the GO TO field

First NOAEPAF Screen

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 7.2.0.1 (BANUSER) (1UIUC)

Pending Change Proxy For: []

ID: []

Transaction: []

Approval Category: []

Approval Type: []

Generate ID: []

Query Date: []

Position: []

Suffix: []

Transaction Default Earnings Job Labor Distribution Routing Other Information and Comments

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>			[]
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Approver Action: [] Queue Status: []

Proxy For User Id.
Record: 1/1

Grad Reappointment EPAF

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 7.2.0.1 (BANDEV) (1UIUC)

Pending Change

ID: 11111111 Scarlet O'Hara

Transaction: GRREAP Graduate Reappointment
REAPPT Reappointment

Generate ID:

Query Date: 15-MAY-2006

Position: U73470 GRAD RES ASST

Suffix: 00

Transaction Default Earnings Job Labor Distribution Routing Other Information and Comments

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Approver Action:

Queue Status:

Proxy For User Id.
Record: 1/1 ... <OSC>

1. Enter UIN, or perform name search
2. Approval Category = GRREAP (Approval Type will default with REAPPT when you select GRREAP in the Approval Cat field)
3. Enter Query Date – use a date that falls within the job’s previous appointment period
4. Enter or select Position – be sure to use the appropriate pooled position (**DO NOT** use a summer position for fall/spring reappointments)
5. Click “NEXT BLOCK”

Complete Transaction Information

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 7.2.0.1 (BANDEV) (1UIUC)

Pending Change Proxv For: []

ID: 111111111 Scarlet O'Hara Generate ID:

Transaction: [] Query Date: 15-MAY-2006

GRREAP Graduate Reappointment Position: U73470 GRAD RES ASST

REAPPT Reappointment Suffix: 00

Transaction Default Earnings Job Labor Distribution Routing Other Information and Comments

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Job End Date	15-MAY-2006	[]
<input type="checkbox"/>	Jobs Effective Date	15-MAY-2006	[]
<input type="checkbox"/>	Personnel Date	15-MAY-2006	[]
<input type="checkbox"/>	Employee Class Code	GA	GA
<input type="checkbox"/>	Job Status	T	A
<input type="checkbox"/>	FTE	.5	[]
<input type="checkbox"/>	Annual Salary	16875	[]
<input type="checkbox"/>	Salary Group	2007	[]
<input type="checkbox"/>	Job Change Reason	SA022	RA001
<input type="checkbox"/>			[]

Approver Action: None Queue Status: []

FRM-40350: Query caused no records to be retrieved.

Record: 1/9 ... <OSC>

Complete New Value Field Information

NOTE: Current Values will default in and cannot be overridden

Applied Status	Field Name	Current Value	New Value
P	Job End Date	15-MAY-2006	-
P	Jobs Effective Date	15-MAY-2006	16-AUG-2006
P	Personnel Date	15-MAY-2006	16-AUG-2006
P	Employee Class Code	GA	GA
P	Job Status	T	A
P	FTE	.5	.33
P	Annual Salary	16875	11472
P	Salary Group	2007	2007
P	Job Change Reason	SA022	RA001

Approver Action: Queue Status:

Enter new value.
Record: 6/9 | ... | <OSC>

1. Job Effective Date = starting date of reappointment
2. Personnel Date = actual starting date of reappointment (should match job effective date unless reappoint is retroactive)
3. FTE = FTE assistant is providing service (please be sure to enter the field in decimals (ex: 50% should be entered as .5))
4. Annual Salary = the 9 or 12 month annualized salary (monthly salary x 9 or 12)
5. Salary Group = 20XX (dependent on the enddate of the current fiscal year; ex: 2005-06 use 2006 for salary group, 2006-07, use 2007, etc.)
6. Save
7. Click Options, Select "Next Action" to move to the FACPAY section

NOTE: all other New Value fields will default and you cannot override the information

Complete Remaining Reappointment Transaction Information

The screenshot displays the Oracle Developer Forms Runtime interface for a reappointment transaction. The window title is "Oracle Developer Forms Runtime - Web: Open > NOAEPAF". The browser address bar shows "Electronic Personnel Action NOAEPAF 7.2.0.1 (BANDEV) (1UIUC)".

Form Fields:

- Pending Change:** 111111111
- ID:** Scarlet O'Hara
- Transaction:** 320078 (waiting)
- Generate ID:** 15-MAY-2006
- Query Date:** 15-MAY-2006
- Position:** U73470 (GRAD RES ASST)
- Suffix:** 00
- GRREAP:** Graduate Reappointment
- FACPAY:** Factor and Pays

Navigation tabs: Transaction (selected), Default Earnings, Job Labor Distribution, Routing, Other Information and Comments.

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Jobs Effective Date	15-MAY-2006	
<input type="checkbox"/>	Personnel Date	15-MAY-2006	
<input type="checkbox"/>	Factor	9	9
<input type="checkbox"/>	Pays	9	9
<input type="checkbox"/>	Hours per Day	4	
<input type="checkbox"/>	Hours per Pay	86.67	
<input type="checkbox"/>	Job Change Reason	SA022	RA001
<input type="checkbox"/>			
<input type="checkbox"/>			

Approver Action: Queue Status:

Enter new value. Record: 1/7 <OSC>

Click "NEXT BLOCK" to access the New Value Fields

End Job Section

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 7.2.0.1 (BANDEV) (1UIUC)

Pending Change **Draw Emp** [dropdown]

ID: 111111111 [dropdown] Scarlet O'Hara [text]

Transaction: 320078 [dropdown] Waiting [text]

GRREAP [dropdown] Graduate Reappointment [text]

ENDJOB [dropdown] End Job [text]

Generate ID: [checkbox]

Query Date: 15-MAY-2006 [calendar]

Position: U73470 [dropdown] GRAD RES ASST [text]

Suffix: 00 [dropdown]

Transaction | Default Earnings | Job Labor Distribution | Routing | Other Information and Comments

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Jobs Effective Date	15-MAY-2006	[dropdown]
<input type="checkbox"/>	Personnel Date	15-MAY-2006	[text]
<input type="checkbox"/>	Job Status	T	T
<input type="checkbox"/>	Job Change Reason	SA022	EJ001
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Approver Action: [dropdown] **Queue Status:** [text]

Enter new value.
Record: 1/4 | ... | <OSC>

Click “NEXT BLOCK” to get to End Job New Value fields

End Job Section Fields

Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Jobs Effective Date	15-MAY-2006	31-DEC-2006
<input type="checkbox"/>	Personnel Date	15-MAY-2006	31-DEC-2006
<input type="checkbox"/>	Job Status	T	T
<input type="checkbox"/>	Job Change Reason	SA022	EJ001
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Approver Action: Queue Status:

FRM-40102: Record must be entered or deleted first.
Record: 5/5 | ... | <OSC>

1. Job Effective Date = date job is to end
2. Personnel Date = same date as effective date
3. Save
4. Click on Routing Tab or go to Options and select “Routing” to set up the Routing Queue

Note: All other fields will default and you cannot override the information

Assign Central Applier

Level Code	Level	User ID	Name	Required Action	Queue Status	Action Date
CNTAPL	90	HR2NOPEAM	EPAF User ID to apply EPAF records	Apply	In Queue	

Required Action.
Record: 1/1

1. Click on drop down arrow below User ID to assign the Central Applier ID (NOTE: although the Central Applier must be assigned, there is no HR review of the transaction prior to the application to Banner).
2. SAVE

NOTE: If additional routing is required, click on the level code field under the CNTAPL select the appropriate level code, user id, and required action. The routing queue must be assigned before the transaction can be submitted.

Enter Comments

Transaction | Default Earnings | Job Labor Distribution | Routing | **Other Information and Comments**

Created Date: 30-JUN-2006 | Submitted Date: | Application Date: |
Originator ID: CMENACHE | Submitter ID: | Applied to Database By: |

Comment: Reappointing Scarlet for the fall 06 semester at 33%| Cathy Menacher 6/30/06 | Date and Time: 30-JUN-2006 11:39:28 AM |
Made By: CMENACHE |

Comment: | Date and Time: |
Made By: |

Comment made by the user ID; insert a new record to add comments.
Record: 1/1 | | ... | | <OSC>

Enter free text comments here

Click on Other Information and Comments Tab to add comments.
SAVE
Click on the Transaction Tab

Submit Transaction

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Transaction

Submit Transaction

Apply Transaction

Cancel PAF

Delete PAF

Next Action

Routing

Other Information and Comments

Errors or Warnings Detail Form

Electronic Approval Summary Form

Dates and Contract Parameters [NZADTCP]

Generate ID:

Query Date: 15-MAY-2006

Position: U73470 GRAD RES ASST

Suffix: 00

Applied Status	Field Name	Current Value	New Value
P	Jobs Effective Date	15-MAY-2006	31-DEC-2006
P	Personnel Date	15-MAY-2006	31-DEC-2006
P	Job Status	T	T
P	Job Change Reason	SA022	EJ001

Approver Action:

Queue Status:

Enter new value.
Record: 1/4

Go to Options – Select “Submit Transaction”

NOTE: You must submit the EPAF to complete the process and move the EPAF to the Approver or to be picked up in the application batch

Submitted Transaction

Oracle Developer Forms Runtime - Web: Open > NOAEPAF

File Edit Options Block Item Record Query Tools Help

Electronic Personnel Action NOAEPAF 7.2.0.1 (BANDEV) (1UIUC)

Pending Change

ID: 111111111 Scarlet O'Hara

Transaction: 320078 **Approved**

GRREAP Graduate Reappointment
ENDJOB End Job

Generate ID:

Query Date: 15-MAY-2006

Position: U73470 GRAD RES ASST

Suffix: 00

Transaction | Default Earnings | Job Labor Distribution | Routing | Other Information and Comments

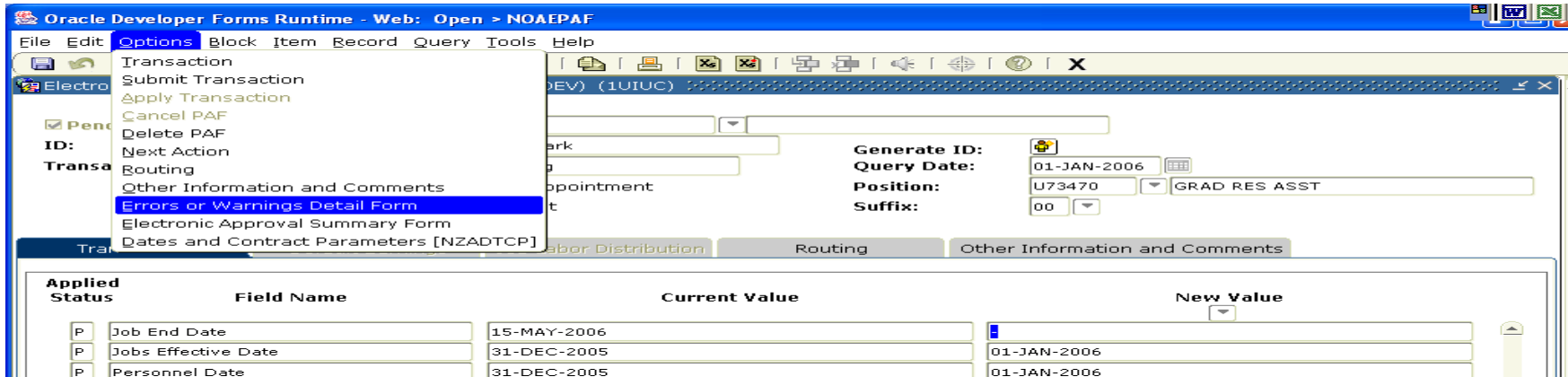
Applied Status	Field Name	Current Value	New Value
<input type="checkbox"/>	Jobs Effective Date	15-MAY-2006	31-DEC-2006
<input type="checkbox"/>	Personnel Date	15-MAY-2006	31-DEC-2006
<input type="checkbox"/>	Job Status	T	T
<input type="checkbox"/>	Job Change Reason	SA022	EJ001
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Approver Action:

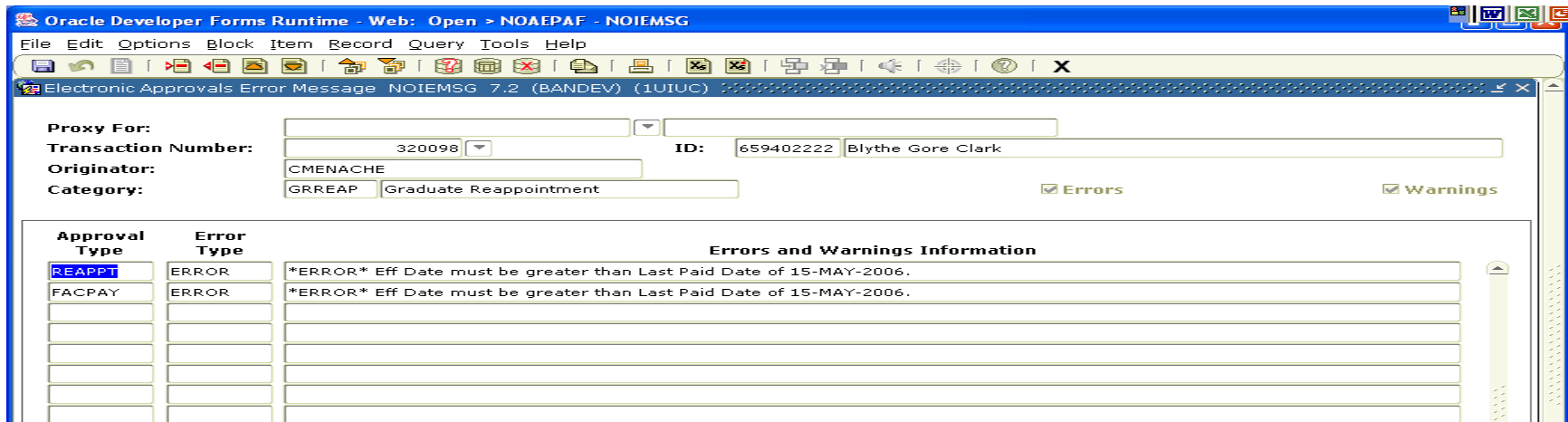
Queue Status:

Transaction submitted.
Record: 1/4 | ... | <OSC>

Errors/Warnings



If the Errors or Warnings Detail Form option is disabled, that indicates there are no errors/warnings on that transaction



Errors must be corrected before you can continue.

Errors/Warnings cont'd

- If an EPAF already exists for a reappointment and is in Waiting status (has not been submitted/applied), you will receive an error message stating “*WARNING* A duplicate transaction, #####, for this person exists for this approval category at Waiting status.” You will need to delete the current EPAF you are working on (either don't save changes or go to Options and select Delete PAF), and then search for the existing EPAF, complete it and submit, or delete it and start a new one.
- You may also receive an error message if you enter an invalid value in a field that contains a list of values. If the value you enter is not in the list, you will receive an Error

Tracking the Status of EPAFs

Units may track the status of an EPAF by following the steps below:

1. Go to NOAEPAF
2. Enter the UIN of the employee
3. Click on the drop down arrow to the right of the Transaction field. You will be provided with a list of all EPAFs processed for the employee including the Transaction #, Category (type of EPAF), and Status
4. Select the EPAF you wish to review by double clicking on the EPAF # or clicking Ok
5. “Next Block” to see the data
6. If the transaction is in Approved status but has not yet been applied in the nightly batch, check for Errors by going to Options, and select Errors or Warnings Detail Form

Statuses of EPAF and What They Mean

- Waiting = the transaction has not been submitted
- Pending = the transaction was submitted to an approver and is awaiting their action
- Approved = the transaction is waiting to be applied
- Completed = the transaction was applied, and the job record has been updated (can see job information on the Job Detail screen in NBAJOBS)