

Graduate Assistant Summer Reappointment EPAF Instructions

5/5/06

Human Resources Applications
265-6549

Grad Summer Reappointment EPAF

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

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

- UIN
- Position and Suffix number – use the appropriate grad summer 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
- Effective Date – the date the summer job is to begin
- Personnel Date – will be the same as effective date for initial summer job
- FTE – FTE at which grad will be performing services
- Salary to be received for the entire summer period
- Enddate – the date the summer job will end

Overall Steps for Grad Summer Reappointment EPAF Data Entry

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 last year’s summer job period
5. Enter or select Position – be sure to use the appropriate summer pooled position (suffix should default to SM)
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 summer reappointment
9. Enter Personnel Date = actual starting date of reappointment (should match job effective date)
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 = the salary for the full summer period (1, 2 or 3 x monthly amount)
12. Enter Salary Group = 20XX (dependent on the enddate of the current fiscal year; ex: 2005-06 use 2006; 2006-07, use 2007)
13. Save

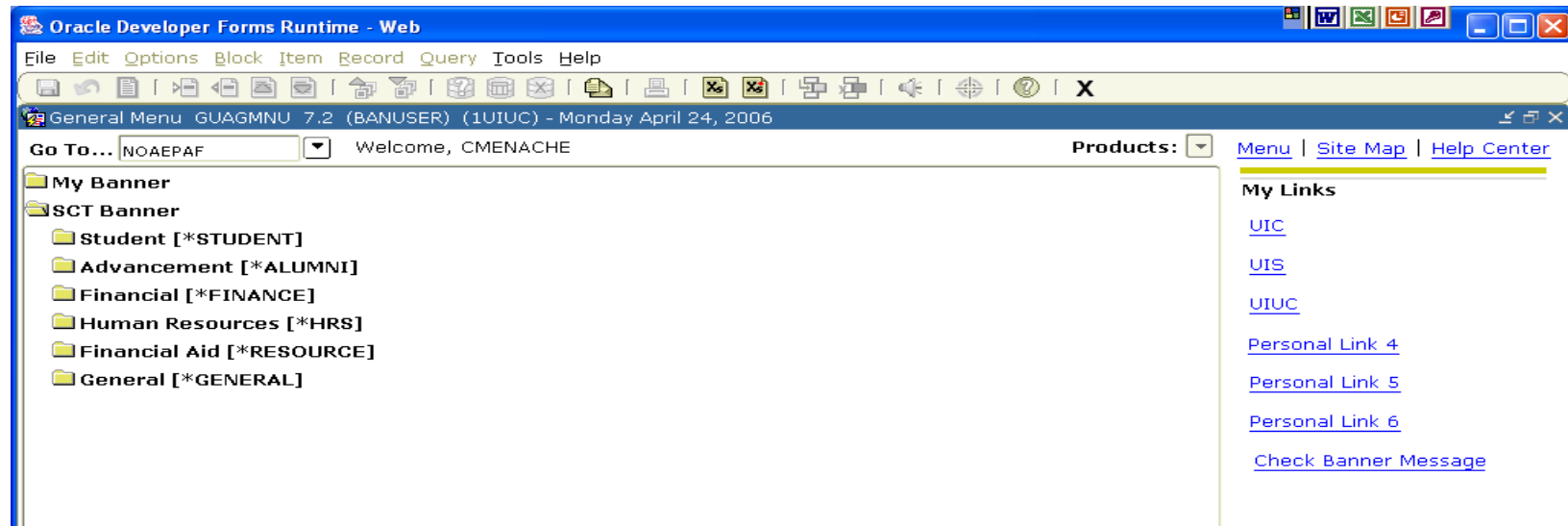
Overall Steps for Grad Summer Reappointment EPAF Data Entry

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 (1, 2, or 3)
19. Enter Pays = same number entered in Factor field
20. Enter Hours per Day = $FTE \times 8$
21. Enter Hours per Pay = $173.33 \times FTE$ (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 summer job is to end
26. Enter Personnel Date = same date as effective date
27. Save

Overall Steps for Grad Summer 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
33. Save
34. Click on the Transaction Tab
35. Go to Options, Select “Submit Transaction”

Grad Summer 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: [] Generate ID: []

Transaction: [] Query Date: []

Approval Category: [] Position: []

Approval Type: [] 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 <OSC>

Grad Summer 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 (BANUSER) (1UIUC)

Pending Change

Proxy For: []

ID: 111111111 [] Scarlet O'Hara

Generate ID: []

Transaction: []

Query Date: 16-MAY-2005 []

Approval Category: GRREAP [] Graduate Reappointment

Position: U68000 [] SUMMER GRAD RES ASST

Approval Type: REAPPT [] Reappointment

Suffix: SM []

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"/>			

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 last year’s summer appt period
4. Enter Position number – enter or select the appropriate summer pooled position
5. Suffix – should default with SM if you entered/selected appropriate summer pooled position (do not use any suffix other than SM for summer reappointments)
6. 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 (BANUSER) (1UIUC)

Pending Change

Proxy For:

ID: 111111111 Scarlet O'Hara

Generate ID:

Transaction:

Query Date: 16-MAY-2005

Approval Category: GRREAP Graduate Reappointment

Position: U68000 SUMMER GRAD RES ASST

Approval Type: REAPPT Reappointment

Suffix: SM

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

Applied Status	Field Name	Current Value	New Value
<input checked="" type="checkbox"/>	Job End Date	15-JUL-2005	<input type="text"/>
<input type="checkbox"/>	Jobs Effective Date	16-MAY-2005	<input type="text"/>
<input type="checkbox"/>	Personnel Date	16-MAY-2005	<input type="text"/>
<input type="checkbox"/>	Employee Class Code	GA	GA
<input type="checkbox"/>	Job Status	A	A
<input type="checkbox"/>	FTE	.5	<input type="text"/>
<input type="checkbox"/>	Annual Salary	3634	<input type="text"/>
<input type="checkbox"/>	Salary Group	2005	<input type="text"/>
<input type="checkbox"/>	Job Change Reason	JB007	RA001
<input type="checkbox"/>			<input type="text"/>

Approver Action: None

Queue Status:

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-JUL-2005	-
P	Jobs Effective Date	16-MAY-2005	16-MAY-2006
P	Personnel Date	16-MAY-2005	16-MAY-2006
P	Employee Class Code	GA	GA
P	Job Status	A	A
P	FTE	.5	.5
P	Annual Salary	3634	3700
P	Salary Group	2005	2006
P	Job Change Reason	JB007	RA001

Approver Action: Queue Status:

1. Job Effective Date = starting date of summer reappointment
2. Personnel Date = actual starting date of reappointment (should match job effective date)
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 salary for the full summer period (1, 2 or 3 x monthly amount)
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"

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 menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, and Help. The toolbar contains various navigation and editing icons. The main form area is titled "Electronic Personnel Action NOAEPAF 7.2.0.1 (BANUSER) (1UIUC)".

Form fields include:

- Pending Change:**
- Proxy For:** Scarlet O'Hara
- ID:** 111111111
- Transaction:** Waiting
- Approval Category:** GRREAP (Graduate Reappointment)
- Approval Type:** FACPAY (Factor and Pays)
- Generate ID:**
- Query Date:** 16-MAY-2005
- Position:** U68000 (SUMMER GRAD RES ASST)
- Suffix:** SM

Navigation tabs at the bottom include: Transaction (selected), Default Earnings, Job Labor Distribution, Routing, and 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"/>			

At the bottom of the form, there are fields for **Approver Action:** and **Queue Status:**.

Click "NEXT BLOCK" to access the New Value Fields

Complete New Value Fields for remaining Job Detail Information

Transaction					
Default Earnings		Job Labor Distribution		Routing	Other Information and Comments
Applied Status	Field Name	Current Value	New Value		
P	Jobs Effective Date	16-MAY-2005	16-MAY-2006		
P	Personnel Date	16-MAY-2005	16-MAY-2006		
P	Factor	2	2		
P	Pays	2	2		
P	Hours per Day	4	4		
P	Hours per Pay	86.67	86.67		
P	Job Change Reason	JB007	RA001		

Approver Action: Queue Status:

FRM-40400: Transaction complete: 7 records applied and saved.

1. Job Effective Date = starting date of summer reappointment (**must** match effective date on first screen)
2. Personnel Date = actual starting date of reappointment (**must** match personnel date on first screen)
3. Factors = number of months of pay (1, 2 or 3)
4. Pays = same as factors (1, 2 or 3)
5. Hours per Day = FTE x 8
6. Hours per Pay = 173.33 x FTE (ex: 173.33 x .5 = 86.665 – enter 86.67)
7. Save
8. Go to Options, Select “NEXT ACTION” to move to enddate job field information

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 (BANUSER) (1UIUC)

Pending Change Proxy For: Scarlet O'Hara

ID: 111111111

Transaction: Waiting

Approval Category: GRREAP Graduate Reappointment

Approval Type: ENDJOB End Job

Generate ID:

Query Date: 16-MAY-2005

Position: U68000 SUMMER GRAD RES ASST

Suffix: SM

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	16-MAY-2005	
<input type="checkbox"/>	Personnel Date	16-MAY-2005	
<input type="checkbox"/>	Job Status	A	T
<input type="checkbox"/>	Job Change Reason	JB007	EJ001
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Approver Action:

Queue Status:

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
P	Jobs Effective Date	16-MAY-2005	15-JUL-2006
P	Personnel Date	16-MAY-2005	15-JUL-2006
P	Job Status	A	T
P	Job Change Reason	JB007	EJ001

Approver Action: Queue Status:

FRM-40400: Transaction complete: 4 records applied and saved.
Record: 1/4

1. Job Effective Date = date summer 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

Enter Comments

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

Created Date: 24-APR-2006 Submitted Date: Application Date:
Originator ID: CMENACHE Submitter ID: Applied to Database By:

Comment: **Date and Time:** 24-APR-2006 05:25:44 PM
Made By: CMENACHE

Comment: **Date and Time:**
Made By:

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: 16-MAY-2005
Position: U68000 SUMMER GRAD RES ASST
Suffix: SM

Applied Status	Field Name	Current Value	New Value
P	Jobs Effective Date	16-MAY-2005	15-JUL-2006
P	Personnel Date	16-MAY-2005	15-JUL-2006
P	Job Status	A	T
P	Job Change Reason	JB007	E3001

Approver Action: Queue Status:

Enter new value.
Record: 1/4

17 Submit Transaction
18 Submitted Transaction

Go to Options – Select “Submit Transaction”

NOTE: You must submit the EPAF to complete the process

Statutes 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)