Graduate Reappointment EPAF Job Aid

This job aid provides step-by-step instructions for reappointing graduate assistants using the Graduate Reappointment Electronic Personnel Action Form (NOAEPAF) in Banner.

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Reappointment of Grads via EPAF vs. Salary Planner

Many departments utilize Salary Planner to reappoint Grads. However, Grads can be reappointed via Salary Planner ONLY if they will be reappointed for a standard term (8/16-12/31 or 1/1-5/15). The Grad EPAF should only be used if:

- your department does use Salary Planner to reappoint grads, OR,
- if a particular Grad employee has non-standard reappointment dates.

Grad Reappointment EPAF and Labor Distribution Change EPAF

If you plan to also change the labor distribution that coincides with the reappointment, you must first complete the Reappointment EPAF and then complete the Labor Distribution change EPAF after the reappointment has applied.

Helpful information to have before you begin

Before beginning to process any EPAF transaction, you may find it helpful to have the following information. Throughout the process, you can also perform searches for this information using the search function as noted throughout.

- Employees UIN or ID
- Position and Suffix Number
- Last Paid Date on Job Detail Record being changed
- Effective Date: The date the change will be ‘live’ in the system (must be the day after the Last Paid Date or any date later)
- Personnel Date: If retroactive, the date when reappointment should have occurred, otherwise the same date as Effective Date
- Will routing to an Approver be needed before the System applies the EPAF? If so, what is the NETID of the Approver?

NOTE: Although you are required to assign a central applier ID, there is no HR review of this transaction prior to being applied to Banner.
Steps

1. In the main Banner menu **Go To** field, type NOAEPAF and press the enter key.

2. Enter the employee’s UIN in the ID field or search for the employee by name. The Transaction Number will auto-populate later in the process.

3. Press the Tab key to move to the Query Date Field, and enter the appropriate query date.

   **NOTE:** If you use today’s date, you will not be able to see jobs that ended prior to today. If you are reappointing a graduate student to an assistantship that previously ended on May 15, use May 1 of the current year for the Query Date.

4. Type GRREAP in the Approval Cat field or double-click on the field to select Graduate Reappointment code.

   The Reappointment code (REAPPT) defaults into the Approval Type field when you select GRREAP in the Approval Cat field.

5. Enter the Position and Suffix numbers in the appropriate fields. If you do not know the Position and Suffix numbers, you can search by clicking the Search icon next to those fields.

6. Press CTRL + PAGE DOWN or click the Next Block icon.
The New Value field for Job End Date has a dash ("-"") and cannot be overridden.

7. Enter the New Value for the Job Effective Date (starting date of reappointment; the system requires you to use a date greater than the Last Paid Date. You can find the Last Paid Date on the Job Detail block in NBAJOBS).

8. Enter the New Value for the Personnel Date (actual starting date of reappointment; the Personnel Date will match the effective date unless the reappointment is retroactive [for example: effective date 1/16/XX; personnel date 1/1/XX]).

The New Value field for the Employee Class Code has “GA” (Graduate Assistant) and cannot be overridden.

The New Value field for the Job Status has “A” (Active) and cannot be overridden.

9. Enter the New Value for the FTE. If the FTE is not changing, you do not need to enter a New Value here. This field can be entered, but if not, the system will default with current FTE. Note this is a decimal field (ex: 50% should be entered as .5)

10. Enter the Salary Group year. The year follows the Fiscal Year (for example, Fiscal Year July 2006 – June 2007 equals Salary Group 2007).

11. Enter the Annual Salary amount. Be sure to annualize the salary even if you’re reappointing the graduate student for only one semester.

   NOTE: Follow Campus Policy for determining appropriate salary rates.

The New Value for Job Change Reason has “RA001” (Graduate Reappointment) and cannot be overridden.

12. Press F10 or click the Save icon.
13. Select Options → Next Action to get to the second screen of the process – Factors and Pays.

The "Approval Type" field changes to reflect FACPAY (Factors and Pays).

14. Press CTRL + PAGE DOWN or click the Next Block icon to move into the form.

15. Enter the New Value for the Job Effective Date (start date of reappointment; this Effective Date must match the Job Effective Date from step 7).

16. Enter the New Value for the Personnel Date (start date of reappointment; this Personnel Date must match the Personnel Date from step 8).

17. The New Value for Factor defaults to “9” (for 9 mo. service). This can be overridden, if applicable. (NOTE: This value defaults to 9 even if the Current Value is 12 (for 12 mo. service). If the grad is appointed on a 12-month service basis, override the factor and enter 12.)

18. The New Value for Pays defaults to “9” (for 9 mo. service). Enter the same value as in step 17.

19. Enter the New Value for the Hours per Day (8 x FTE). You must enter this information.

20. Enter the New Value for the Hours per Pay (173.33 x FTE). You must enter this information.

The New Value for Job Change Reason has “RA001” (Graduate Reappointment) and cannot be overridden.

21. Press F10 or click the Save icon.

22. Select Options → Next Action to get to third screen of the process, End Job.
The "Approval Type" field changes to reflect ENDJOB (End Job).

23. Press CTRL + PAGE DOWN or click the Next Block icon to move into the form.

24. Enter the New Value for the Job Effective Date (date job is to end).

25. Enter the New Value for the Personnel Date (date job is to end; this date will match the end Job Effective Date from step 24).

The New Value field for the Job Status has “T” (Terminated) and cannot be overridden.

The New Value for Job Change Reason has “EJ001” (End Job) and cannot be overridden.

26. Press F10 or click the Save icon.

27. Select Options → Other Information and Comments, or click the Other Information and Comments tab to add comments.

28. Type comments in the free-form text box. The comments create a history of what action was taken. The Date and Time and Made By fields auto populate.

29. Press F10 or click the Save icon.
30. Click the Routing tab to complete the routing information.

31. If your unit is not required to submit the transaction for additional review/approval, click on the User ID icon for the CNTAPL (Central Applier) and the field populates with the ID for the automatic Applier (HR2NOPEAM). Go to Step 33.

**NOTE:** Although you must assign a central applier ID, there is no HR review of this transaction prior to being applied to Banner.

Routing tab appears as above when you first access it.

After clicking the User ID Search Icon once, the User ID and Name fields auto-populate as pictured above.
32. If your unit is required to submit the transaction for additional review/approval before it applies, use the following sub-steps:

a. Click the User ID icon for the CNTAPL (Central Applier) and the field populates with the ID for the automatic Applier (HR2NOPEAM).  
   NOTE: Although you must assign a central applier ID, there is no HR review of this transaction prior to being applied to Banner.

b. Click in the next available row (it will become highlighted).  Double-click the Level Code field and select the appropriate Approval level from the list of values.  For example, you may select Level 20 for a College-level approval in row 2, under the CNTAPL (Central Applier at Level 90) row.

c. Click the User ID icon and select the appropriate Approver. (Or, if you already know the Approver’s NetID, you can type that directly in the User ID field.).

Required Action field options:

Approval- The Transaction Status will reflect “Pending” until the transaction has been approved if “Approval” is selected. The Transaction Status will reflect “Approved” once the approver has taken action. This field defaults to “Approval”, requiring the approver to approve the transaction before it can be applied.

FYI - FYI is information only. No additional action is required by the FYI assigned User ID. If transaction needs to be sent only as FYI, select “FYI” from the drop down under Required Action.
33. Press F10 or click the Save icon.
34. Select Options → Submit Transaction.

You must submit the EPAF to complete the process.

The EPAF remains in “Waiting” status and is not forwarded for approvals/application until the transaction is submitted (the “Waiting” status is shown to the right). You can check the status of the EPAF by viewing the Transaction Status field on the EPAF, circled to the right. Below are the transaction statuses you may see:

1) ‘Waiting’ = the transaction has not been submitted
2) ‘Pending’ = the transaction was submitted to an approver and is awaiting their action.
3) ‘Approved’ = the transaction was approved and is waiting to be applied by the nightly batch process.
4) “Completed” = the transaction was applied in the nightly batch upload, and the job record changes are applied.
Approval and Completion

The approver, if one is designated, receives notification upon logging into Banner that they have a transaction to approve. The approver takes action using NOAAPSM. On that form, they can take the following actions:

- Approve
- Return for Correction
- Apply

If no additional approvals are necessary, you will see the transaction status of “Approved”, until it is fully applied by a batch process.

After the EPAF has been approved (either automatically or by an approver), it is applied in the system via a nightly batch upload process. As noted previously, the transaction status of “Completed” displays when this upload has occurred.

EPAF Errors and Warnings

An Errors and Warnings Information list, similar to the one to the right, might appear after you submit the EPAF. This list appears only if you have any errors or warnings relating to the EPAF being submitted. While warning messages are ignored by the upload/apply process, any error messages will prevent the EPAF from being applied.

This screen only appears AFTER you submit the EPAF.

In this example, the errors resulted because the effective date was before the last paid date on the REAPPT, FACPAY and ENDJOBS sections.

To correct this particular error, the dates on each section must be changed to be after the last paid date, and the EPAF needs to be resubmitted.
You also may encounter other error messages when entering data in the EPAF process. If this happens, you need to review the transaction, correct the error, and then select Options → Submit Transaction. Some common errors include those listed below.

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Cause</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>ERROR</em> Invalid Salary Group.</td>
<td>If a field has a list of values behind it and you try to enter an invalid value, it will generate an error message right away. This example shows the error for an invalid Salary Group entry.</td>
</tr>
<tr>
<td><em>ERROR</em> All Approval Types must be committed prior to submission.</td>
<td>If you try to Submit prior to finishing all portions/screens of an EPAF, it will generate an error in the status bar at the bottom left of your screen.</td>
</tr>
<tr>
<td><em>WARNING</em> A duplicate transaction, 298169, for this person exists for this approval category at Waiting status.</td>
<td>If an EPAF already exists and is in progress (has not been applied), you will see this error as soon as you page down into the form after entering the key block information (Approval Cat).</td>
</tr>
</tbody>
</table>