

Electronic Personnel Action Form (EPAF) User Guide

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Banner & EPAF Resources Website

Visit: www.uidaho.edu/human-resources, then click “Managers”, then “Banner & EPAF Resources”
Direct link: <https://www.uidaho.edu/human-resources/managers/Banner-EPAF-Resources> – Select the
“+” Icon to see the documents listed for each area:

EPAF Training Resources

- EPAF Manual
- EPAF Training Supplemental Material – (Excel version attached)
- Payroll Calendars – Link to Payroll website
- EPAF Proxy Instructions
- Approval Queue Form

Additional EPAF Training Resources and Summer Session

- EPAF Decision Tree: an Excel Workbook that takes you through the process of selecting EPAF Approval Category
- Common EPAF Errors and Reminders
- Supervisor Set-up Instructions
- EPAF Summer Session Information
- EPAF Summer Session Calculation Template

Process and Policy Reminders for EPAFs and International Employees

- HR Policy and Process Reminders
- International Employee Reminders
- International Foreign National Information (FNIS) Form
- Affordable Care Act (ACA) Eligibility

Banner Reports

- NWRDERP – Departmental Employees
- NWREMPT – Employee Termination
- NWRVACT – PCN Vacancy Vacant Position
- NWRDPOS – Department Positions
- PWROREM – Lists employees per Organization / Fiscal Year

Banner Forms

- NBIPINC – Position Incumbent List (PCN)
- NTRACAT – Electronic Approval Category Rules

EPAF Terms to Know and Definitions

What is an EPAF? The University of Idaho uses the Electronic Personnel Action Form (**EPAF**) in BANNER to create employee records and to update these records when changes occur. This information is used to generate an employee's timesheet and to ensure that the employee is paid timely and accurately

Who is an Originator? An Originator is the designated departmental personnel authorized to create EPAFs. It is your task to correctly input the necessary information within the EPAF. This is a very important role as you are the first step in making sure that an employee's appointment is accurately set-up and maintained within Banner

Who are the Approvers? Once an EPAF is submitted, Approvers are the individuals authorized to review and approve the information within an EPAF. Often, there will be multiple Approvers required for a single EPAF as they contain information requiring review or approval from specific areas. For example, many EPAFs require approval from the Budget Office to ensure financial accuracy and compliance. Another example includes the Provost's Office who reviews EPAFs specific to faculty. Human Resources is the final approver and is responsible for its application to Banner

Board Appointed- Board Appointed positions (BA) is a position that is approved by the State Board of Education. Includes Classified, Exempt, Post Doc Fellows, Faculty, and Graduate Assistants

Temporary Help-PERSI (T1) – PERSI is an acronym for Public Employee Retirement System of Idaho. Positions are PERSI eligible if they are non-student and work 20 or more hours for 5 or more consecutive months. Also, known as T1 positions (see employee class), or IP (approval categories). PERSI positions are reported to the State Controller through the Employee Information System (EIS) since November 15, 2009

Temporary Help-Non-PERSI (T4 / ST) - Temporary Help position filled by Students and Work-study, or Non-Students. These positions can be appointed maximum for one year.

EPAF Training Supplemental Material - There are two versions of this information, one is a word document (EPAF Training Supplemental Material) and the other is in Excel (EPAF Supplemental Material Workbook). The word document is provided as a companion to this training manual. You can also work with the Excel version to quickly access the information you'll need for creating an EPAF

EPAF Approval Category: This is the six-letter characteristic for each EPAF Approval. There are unique characteristics of each category, including employee type (Classified, Exempt, Faculty, Graduate Assistant, Temporary-PERSI, Temporary Help, Student and Work-Study), new or previous PCN, Employee Class, Appointment Type, Board Appointed Funding (Permanent or Temporary), and the transaction you are working on. Be sure to select the correct EPAF Approval Category to report correct codes to the State Controller

Payroll Calendars:

- Payroll and Approval Deadlines – FY 20xx: Organized by Fiscal Year (July – June), this calendar shows the Effective Dates, Pay Dates, EPAF Deadlines, when Timesheets are available and Approval Deadline for each Pay Period of the Fiscal Year. Watch for the EPAF Deadline! (2nd Tuesday of each Pay Period) Remember you can post an EPAF at any time in the pay period. Approval Deadlines can also vary according to department
- 3-Year Fiscal Calendar – Organized by Fiscal Year, with three total fiscal years. Includes the year previous and the future year. It shows each pay period (or bi-week) with highlighted UI holidays
- Academic and Fiscal Payroll Dates - FYxx – Shows the Payroll & Contract dates for:
 - Fiscal Year-Paid over 12 months, 2080 hours total, 26 Pays/Factors
 - Academic Year-Paid over 12 months (Deferred Pay)—1560 hours total, 26 Pays / 20 Factors
 - Academic Year-No Deferred Pay—1560 hours total, 19.5 Pays/Factors
 - Academic Semesters-No Deferred Pay—Fall Semester (720 hours), Spring Semester (720 hours)
 - Summer Session-No Deferred Pay—13 weeks (520 hours)

Appointment Types- It is important to know the appointment type for an employee to select the correct Approval Category. Go to NBAJOBS and a query date of **01-01-96** to search for all previous job history. Appointments are:

- **Original Appointment-** When a person has never held a position with the University in the past. If an employee is working in a Temporary Help Non-PERSI or Work Study position and begins working in a PERSI or Board Appointed position, their EPAF will need to use an Original Appointment, there can be a second original appt.
 - **Positions we report to State:** *Classified, Exempt, Faculty, Graduate Assistants, TH PERSI (T1)*
 - **Positions we do NOT report to State:** *T4/ST non-PERSI, Work Study, Unit Pay, Summer Session*
- **Additional Appointment-** When a person adds a second job while already holding an active position. Exception: you cannot add a Board Appointed position to a Temporary Help position; you must use reappointment or original appointment, which will set the new position as primary
- **Reappointment-** When the employee has a break-in-service, meaning he/she has worked for the University in the past and will have a point in between the old and new position where they do not hold an active job
- **Change-** When a person makes a lateral transfer from one active board appointed position to another board appointed position, or a lateral transfer from one active IP (PERSI) position to another IP (PERSI) position or from active IP (PERSI) to board appointed position.
- **Promotion-** When a person makes a change to a new PCN for a higher paying job or a job with the title of a higher pay grade without conducting a search. Only used for board appointed employees
- **Continued Appointment** - Departments can extend the job without a break-in-service, this EPAF categories will bypass I-9 date.

The following are various codes related to a position

- **FTE** – Full Time Equivalent: measure the percentage of time assigned to a position. 1.0 = full-time. 0.5 = half-time →**Example:** Employee works 40 hours per pay period. FTE is calculated by dividing the hours per pay period by 80. (40 / 80 = 0.5 FTE)
- **Hours** – Typically the hours worked for a position. It is calculated by using the Hours per Day (8 for full time) times 10 working days - Hours per Pay (8 x 10 = 80). Be careful with additional appointments for the same employee not to have the sum of all hours be greater than 80. You may need to modify other positions to have fewer hours

- **Employee Class** describes the type of employment, earnings, hours per bi-week / % of time associated with an employee. Each position is dependent upon the selection of the correct Employee Class. Refer to the Employee Class Descriptions Table in the Supplemental Material (See Supplemental Material Page 8)
 - **Board Appointed:** Faculty (F1, F2...), Exempt (E1, E2...), Post-Doctoral (P1, P2...), Classified (C1, C2...) and Graduate Assistants (GA)
 - **Student and Temporary Help (TH):** TH-PERSI Eligible (T1), TH-Non-PERSI Eligible (T4), Student (ST), Work-Study (SF, SI), and Unit Pay (T5)
 - **Other:** Retirees (R1), Additional Comp (AC) and Vehicle Stipends (CM)
- **PCN** is the Position Control Number, a six-digit code assigned to each position. For Board Appointed positions, the PCN will be given to you on the People Admin or it will be provided to you by the Dean / Director Level. For Temporary Help, we have designated PCNs that must be used per the job type worked by the employee (see Supplemental Material Page 6 & 7)
- **Suffix** is the two-digit code assigned to each position to clarify its type of position (see Supplemental Material)
- **Job Location** – Physical location of the job and ‘IDAHO’ is a default information of the field. Always be sure of the job location and that it’s properly selected in the EPAF. This location is needed for taxation purposes and worker’s compensation by the Payroll Office

Board Appointed Position Titles – They have such a large range of titles that they often must be abbreviated in a certain manner. Reference to **PeopleAdmin** to find the correct title of each position or contact your AAC

- The position title is the official title for the position. It is abbreviated in Banner. Examples:
 - Position Title – Administrative Assistant 2. Banner (Working) Title – Administrative Asst 2
 - Position Title – Program Specialist. Banner (Working) Title – Program Splst
- For Graduate Assistant positions, the title **MUST BE** either **Research Assistant** or **Teaching Assistant** or **Support Assistant**
- Any questions on Board Appointed Position Titles, please contact Classification & Compensation at hr-classcomp@uidaho.edu
- For benefit eligible Faculty positions, the title will be “**Regular Faculty**” unless the Provost’s Office instructs otherwise. They will review these EPAFs to ensure correct title usage
- For Temporary Faculty positions, please enter the appropriate title in one of the following formats (see chart at right)

Temporary Faculty Titles
Temp Faculty - Lecturer
Temp Faculty - Visiting Faculty
Temp Faculty - Acting
Temp Faculty - Associate

Pays- The number of pay checks within a fiscal year. Each business day in a bi-week equals 0.1, so one pay period equals 1. You count only business days M-F, not weekends. If a full time benefit eligible employee, the Pays should be 26 regardless of the jobs effective date or begin date

Factors- The actual pay periods an employee physically worked in a fiscal year. It usually is the same as Pays except for the Academic Faculty with deferred pay (spread pay would be factor 20, pays 26). If Academic Faculty chooses not to spread pay then the pays and factors should be 19.5. A Classified Employee with a 10-month appointment, count the pay periods accordingly

RPR—Retroactive Pay Request - Late pay added to an active job with prior Jobs Effective Date covered. Requires a Retroactive Pay Request form. More detail covered on the form

Special Check request - Late pay that cannot use RPR if there is no active job; Requires a [Special Check Request form](#) and a fee (\$75)

EPAF Dates – Various dates are important for an EPAF.

- Query Date: Auto-fills in today's date for the EPAF field. You enter the date the transaction should occur. The query date does not affect Banner system. It is tied to the Labor Distribution screen (MB)
- Jobs Effective Date: The date that a particular part of the EPAF will take effect, usually in the current pay period. It can be a date prior to the current pay period, if it is an Original Appointment or appointment to New PCN
- Personnel Date: Date meant to show when a particular employee transaction should have occurred. Since you cannot update job information prior to the Last Paid Date, you may not always be able to change it on the actual date of change. Or you may miss the EPAF deadline for the pay period. It is recommended to note there will be the calculation of a retroactive pay request (RPR) or special check in the EPAF Comments.
- Job Begin Date: Date used when the employee is appointed into a job that he/she has never held before. Same as jobs effective date with an original appointment
- Current Hire Date: Date used only for brand new employees to the University of Idaho or for employee returning to work after break-in-service, or a transfer from non-benefit eligible to a benefit eligible position
- Seniority Date: The Cabinet used the term "time in position."
 - There is a reclassification that results in change of more than 1 pay grade
 - An employee moves to a new position that is different in responsibilities, etc. from their current position. The employee may apply for or is otherwise promoted or moved into the position. (This may be a promotion or change that would be in the same pay grade.)
- When there has been a break in service and they are now re-hired
- Contract Begin / End Date-Used only for deferred pay employees. Defines the period the employee will begin and end a particular job during the current fiscal year (FY)
- Termination Date- All Temporary Help positions have a future end date within the EPAF; some are known at the time it is created and if not known at the time, then give maximum one year of employment. You can use the Academic and Fiscal Payroll Dates calendar to determine the term date for the position, if applicable

Jobs Effective Date: MM/DD/YYYY
Personnel Date: MM/DD/YYYY
Job Begin Date: MM/DD/YYYY
Current Hire Date: MM/DD/YYYY
Seniority Date: MM/DD/YYYY

Transaction Status within an EPAF:

- Waiting: Still sitting in the originator's queue. If the EPAF still has a status of *WAITING*, it needs to be submitted. When the EPAF has been submitted, the transaction status will change from *WAITING* to *PENDING*
- Approved: The EPAF has been forwarded to the Human Resource queue
- Return/Correction: An error has been found by an Approver and returned to the originator for correction. Look in the *COMMENTS* section for information on what needs to be corrected. An e-mail will be sent to the originator once the EPAF has been returned. **Do NOT reply to epafcorrections@uidaho.edu automated email.**
- Completed: The EPAF has been applied; Double Check that this stage occurs!

EPAF Routing Queues: All EPAF's go through an approval queue before they are applied to the system. This queue varies dependent upon the position type, individual college / department policies and approval type. As the EPAF travels down the Routing Queue after submission, it will change Status as it moves from queue to queue. You will see the following routing queue statuses:

- In Queue: The EPAF is waiting for the next person to approve. You'll see all those in the queue by those that have In Queue as their status
- FYI: This is for those that have no approval, but need to have this for their information
- Pending: The EPAF has been submitted and is in the approver's queue (the person or group who has the EPAF)
- Approved: The EPAF has been forwarded to the next approver in the queue
- Applied: The EPAF has been applied to the system

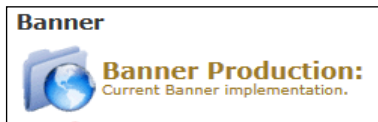
What is a Pay Period? A pay period is the two-week time span during which an employee works. The time is then calculated over the following two weeks and converted into a pay check/direct deposit. A pay period generally runs like this (see below). EIS is the Employee Information System (State of Idaho). We report to EIS every pay period

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
Beginning of Pay Period # 2		Timesheets 5 PM		Return of Actual Last Paid Date		
Payroll Processing (Pay Period # 1)						
8	9	10	11	12	13	14
		EPAF Deadline 5 PM	EPAF Processing Sending EIS File		PAYDAY!! \$\$ For PP # 1	End of Pay Period # 2

Before You Start an EPAF – Gather ALL the needed information before starting!

Verify the employment history of the employee in Banner: If the employee has worked for the University in the past, it will affect the EPAF Approval Category for your transaction

1. Go to www.banner.uidaho.edu/banner , then Login into Banner Production (**not Banner Self Service**)



2. Type **NBAJOBS** in the “Go To...” box and hit enter
3. Type-in the V-number for the employee and tab
4. In the Position field, select **Shift + F6** or hit the drop-down menu and select “List of Employee’s Jobs (NBIJLIST)”

Position: ...

Option List ✕

[List of all Positions](#)

[List of Employee's Jobs \(NBIJLIST\)](#)

5. On the next screen, enter **01-JAN-1996** (type ‘010196’) as your query date. This will ensure that you get all positions for this employee

Query Date: *

EMPLOYEE JOB INQUIRY				
Position *	Suffix *	Begin Date *	End Date	Job Type
007520	00	09/18/2011	06/29/2019	Primary
007785	00	06/16/2003	06/25/2010	Secondary
007870	00	06/30/2019		Primary

Verify the employee's I-9 date in Banner: If the employee has worked for the University in the past, you will need to verify that the I-9 information has not expired. If the I9 date is more than 3 years old, the employee will need to go to Human Resources to re-certify their I-9. To find that date, use the steps below:

1. Type **PEAEMPL** in the "Go To..." box and hit enter
2. Type-in the V-number for the employee and page down
3. Click on the **United States Regulatory** tab
4. Look under the I9 section for the Date. Check to see if it is not more than 3 years old. If it is and if employee has a break in services, then they will need to fill out new I-9 paperwork at Human Resources

Employee PEAEMPL 9.3.8 (* STAG *)

ID: V90000535 Val Kilmer

General Employee | **United States Regulatory** | Canadian Regulatory

UNITED STATES REGULATORY

FLSA

FLSA Indicator * Accrual Work Period CLAS Standard Work Week

I9

Form Indicator Received Expiration Date

Date 09/20/2017

EPAF Time

1. To log on into EPAF, go to https://vandalweb.uidaho.edu/PROD/twbkwbis.P_WWWLogin and enter your **NetID** and **Password** for University of Idaho Vandal Web. Select the **Employees** tab and click **Electronic Personnel Action Forms**, then click **EPAF Originate/Approve**, then click **New EPAF**
2. When it comes to creating EPAFs, you need three main components;
 - A) EPAF Approval Category, B) Position Control Number (PCN – 6 digits), C) Suffix (2 digits)

User Login

✓ Enter your University of Idaho **NetID** and **password**.

Need assistance with your NetID? You may change your password by visiting the **Account Management** page. Once logged in select the "Change Passwords" menu item.

NetID:

Password:

Login

Creating a Board Appointed EPAF

1. Select the Employee: If you already know the employee's V-number, enter it into the first open field entitled "ID" (at right). If not, then click on the magnifying glass to open up the Person Search window. On the next screen, select the appropriate person by double-clicking, it will return you to the first screen with that info entered into the "ID" section

* - indicates a required field.

ID: * 

Search Criteria

Employee:

Last Name:

First Name:

By entering Last Name, First Name into the Search Criteria, you will be able to search for his V-number. Click Go. Check the Employee box to limit the search to an Employee (e.g. current employee). Enter additional information to search for the employee (see box at right)

2. Enter the Query Date: The Query Date for this EPAF should be the date this transaction supposed to occur. In this case, it would be the first day of the current pay period. Using the Payroll Calendar, enter that date in the proper format (MM/DD/YYYY).

Query Date: MM/DD/YYYY *

Approval Category: * 


3. Select the Approval Category: By clicking on the drop-down box below the Query Date, a list will be provided of all available appointment types and changes that can be applied to a new or current employee. Each has a short description followed by a specific six-lettered EPAF approval code for when it is applied. We need to scroll down to the sections to that pertain to the EPAF: Common, Classified, Exempt, Faculty, Graduate Assistant, T4 / ST Non-PERSI, T1 PERSI, and Work Study. A paper version for all EPAF Approval categories is included in the supplemental information - Choosing the appropriate category in advance is advised. You can also use the [EPAF Decision Tree](#) and other info in the EPAF Supplemental Workbook


4. Enter the Position Control Number (PCN): For Board Appointed positions, the PCN will be given to you on the PeopleAdmin or contact your AAC if you do not have. For Temporary Help, we have designated PCNs that must be used according to the job type worked by the employee (see supplemental material page 6 & 7)

Once you enter those codes into the screen shown below, it will flood in some basic information. Notice that this approval type is the **Original Appointment**. Make sure the "Select" radio button (far right) is checked next to the PCN you just entered. If this person had multiple jobs, then it automatically selects their previous position. So ALWAYS double check the "Select" radio button to make sure it will build the PCN for the correct job

ID: Brad Pitt, V90000582
 Query Date: Apr 04, 2012
 Approval Category: Classified-Original Appnmt, CPPOAT

Classified, Permanent, Original Appointment, AOC12

Search Type	Position	Suffix Title	Time Sheet	Organization	Start Date	End Date	Last Paid	Date Status	Select
 New Job	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/>

 There are no active jobs based on the Query Date.



Clicking on Next Approval Type button will take you to the exact same screen but the title will change from Original Appointment, AOIH to Labor Distribution, MB. You will need to re-enter the PCN, suffix and click "Select" at the end of the same line. Click Next Approval Type again; it will change from **Labor Distribution, MB** to **TH-Termination of Job**. Re-enter the same PCN and suffix as before, check the "Select" button, and click the Go button. *FYI: Sometimes you will not need to re-enter the PCN as it will flood in. Be sure to still double check the "Select" button. Also, there will not always be multiple approval types; it all depends on the type of EPAF you are submitting*

5. Transfer the Job Information into the EPAF: After clicking Go, you will be transferred to the form where you will enter all the data given to you for this EPAF. If the data line has "(Not Override able)" next to it, then Banner has already flooded in the correct information and it cannot be changed. The first section appears (see at right)

5.1 Dates: Enter the dates for your EPAF using the correct format: **Jobs Effective Date: MM/DD/YYYY**

5.2 Hourly Rate: In this case, you see that it says Hourly Rate, which was provided in the original information given to you for this EPAF. Enter the rate without a dollar sign (0.00). Exempt and Faculty positions are paid on a salary basis which means their EPAF will ask for the annual salary

5.3 FTE: Full Time Equivalent. Calculation is Hours per Pay / 80. Example: ½ time position, 40/80 = 0.5 FTE

5.4 Hours per Day: Hours per Day are given to us based on the FTE

5.5 Hours per Pay: This is the Hours per Day times # of work days in a Pay Period (8 x 10 = 80)

5.6 Factor: The actual pay periods an employee physically worked in a fiscal year. Check the payroll and approval deadlines sheet to see how many pay periods remain. This will be your factor

5.7 Pays: The number of pay checks within a fiscal year. Each business day in a bi-week equals 0.1, so one pay period equals 1.0. You count only business days M-F, not weekends

5.8 Job Employee Class Code / Employee Class Code: The job employee class corresponds with the position. The employee class corresponds with the employee. Most of the time, they should be the same, but if there is more than one position, the Employee Class Code can be different

5.9 Timesheet Orgn / Organization Code: The Timesheet Orgn and Home Organization codes are the specific rollup code assigned to the department for which this job will be operating under. The three digit code should be the same for BOTH entries. If you know this code for your department, go ahead and enter it. For training purposes, you may use 906 as a substitute

5.10 Job Location: This will always default to Idaho, but it is necessary for payroll that this be updated to the actual location if different. *FYI: If the location is not present in the drop down list, then email the Payroll Office payroll@uidaho.edu to create the appropriate location for you to then select*

5.11 ACA Indicator (Yes = Y or No = N): This code is for Affordable Care Act (ACA) Eligibility. The University is required to offer medical insurance for non-benefit eligible employee who meet certain criteria. **Please reference to EPAF Training Supplemental Material 'Page 11'**. If employee has any questions about their eligibility, have them contact **Benefit Services** at 885 – 3100 or e-mail benefits@uidaho.edu.

- For benefit eligible Board Appointed positions (classified, exempt, postdoc fellow and faculty) and Temp Help non-PERSI positions (T4/ST and Work Study), the field is set as 'N'= No.
- For TH PERSI positions (T1) and non-benefit eligible faculty positions (F4, F9), the field is blank to select either 'Y' = Yes or 'N' = No.

Enter the Labor Distribution (Index): The next section of the EPAF defines what budget from which the compensation will be expensed. Often, the budget info will flood in on its own and will only require review for accuracy, as it did in this case. The Index represents the actual budget number for the position. The Account Code (E code) is an expense number used to differentiate between salary types.

To determine which Account Code to use, refer back to the supplemental material (page 6). REMEMBER, although this information floods in, it may not be correct! Double check everything!

If you are only using one index to fund the position, then it should reflect 100%. This number should only be decreased if the position will be funded by multiple budgets. In either case, the total must equal 100% to ensure a full paycheck

7. Save the Information: It would be a good time to save all the information you just entered. Find one of the Save buttons on the screen and click it

- ✓ Watch for the six-digit Transaction number and Transaction Status at the top of the screen

Name and ID: Brad Pitt, V90000582
Transaction:
Transaction Status:
Approval Category: Classified Permanent Original Appointment, CPPOAT

Query Date: Apr 04, 2012

8. Routing Queue: The Routing Queue for EPAF has a pre-designed list of approver levels. Select the correct approver for each level. Clicking on the magnifying glass will open a window displaying a list of all available options for that approver level

FYI: If you have multiple windows on your desktop, this list will pop up behind your screen and you will have to minimize all windows to see it

9. Comments (Enter Relevant Information into Comments): The originator of an EPAF transaction must enter comments clearly explaining and documenting the intent of the EPAF. The comments are required and a legal record; they must not be tampered with

- Include your first name & phone number so you may be contacted if there are any questions or if clarification is needed
- Provide a brief explanation as to the purpose of the EPAF
- Include all financial calculations for Board Appointed positions so the Budget Office can understand your entries
- Hiring method – have an open search through PeopleAdmin or a search waiver. PeopleAdmin Action Number (**A**) and Hiring Proposal Number (**HP**) should be included in the comments. See examples below
 - For faculty positions: ex. [F000003A](#), [F00012HP](#)
 - For classified and exempt/postdoc: ex. [SP00023A](#), [SP00013HP](#)
 - For Temp Help (only Hiring Proposal needed): ex. [STH00002HP](#)
- Include a completion date of Background Check or enter “Background Check is not required”
- Salary Calculations and hourly rate etc.
- RPR—Retroactive Pay Request (late pay added to the next paycheck); this requires a RPR form
- Special Check request (late pay that cannot use RPR); this requires a Special Check Request form and [fee](#)
- Make comments regarding terminated employee leave payoff / transfers to ensure that leave is handled correctly. It is assumed that leave will be paid out with their last paycheck automatically unless otherwise stated in the comments. Be sure to **include termination date**.
- Keep all comments precise and brief, refrain from using inflammatory and inappropriate statements

11. Review and Submit: If no errors occur after saving, proceed by scanning down the EPAF and looking over each entry for accuracy. Once you have checked all areas, click “**Submit**”. Once again, you will be returned to the top of the screen, where it will show you any errors or inform you that it has been successfully submitted.

****You may print the EPAF screen for your own record****

PeopleAdmin Searches and EPAFs

For all searches in PeopleAdmin, we will need certain codes from within PeopleAdmin to be added to the EPAF comments. We need the Action Number and Hiring Proposal Number.

Action Number – The Action Number is representative of the Position Authorization process. Once the position has been authorized by all parties, the Action Number will be one of the following examples:

- Faculty Positions = **F000013A**
- Staff (Classified, Exempt, Post-Docs, etc.) = **SP000012A**
- Temp Help = N/A. No Action Number is required for Temp Help positions

Note that the Action Number is found in the “Position Management” section within PeopleAdmin and is associated with the PCN for a position. A search for the PCN can produce the Action Number.

Hiring Proposal Number – The Hiring Proposal Number is found after certain steps within PeopleAdmin are completed. In the notes for your EPAF, include the Hiring Proposal Number, one of the following examples:

- Faculty Positions = **F00003HP**
- Staff (Classified, Exempt, Post-Docs, etc.) = **SP00002HP**
- Temp Help = **STH00002HP**

Background Check, EPAF Dates and Offer Letter

There are 5 steps when a Hiring Proposal is created within PeopleAdmin:

1. Hiring Proposal Created
2. Approvals (AACs, HRAI, HRS, Executive Approver, etc.)
3. Contingent Offer
4. Background Check (Hiring Proposal Approved) – Background Check initiated and in process
5. Hired – Pending – Background Check has successfully completed
 - Note the EPAF submission and the start date are determined **after** the successful Background Check is completed. The Background Check can be done at any time before a formal offer. Don't delay—contact crimcheck@uidaho.edu
 - Note: The start date of the position **cannot** pre-date the background check date.

Search Waivers or Reappointment: A background check may still need to be done if one has not been completed in the last 13 months (send email to crimcheck@uidaho.edu to find out if one is needed)