

EPAF Basics

University of Oregon

Topics Included

Definitions and basics

NOAEPAF

How to create and submit EPAFs

NOAAPSM

How to monitor the progress of submitted EPAFs

How to check for and fix errors

How to delete and void EPAFs

How to approve EPAFs (for Departmental Approvers)

Deadlines and reminders



Definitions and Basics

What is an EPAF

- EPAF stands for Electronic Personnel Action Form
- An EPAF allows personnel actions to be created and approved electronically, eliminating paper and allowing the originator to track an EPAF through the approval process
- EPAFs are created in NOAEPAF
- After creation, all EPAFs can be seen in NOAAPSM
- EPAFs can change the present and future, but not the past

EPAF Header

ellucian Electronic Personnel Action NOAEPAF 9.3.17 [UO.2] (P... ADD RETRIEVE RELATED TOOLS

Pending: Proxy For: ... [Go](#)

Change

ID: ...

Transaction: ...

Query Date: ...

Last Paid Date:

Approval: ...

Approval Type: ...

Category

Position: ...

Suffix: ...

ID – 95#

Transaction – auto generated by Banner

Query Date – Review “Dates” definitions to determine correct date

Last Paid Date – Will display last paid date for the employee

Approval Category – Select type of EPAF appropriate for the action

Approval Type – Banner will auto fill based on the Approval Category selected

Position - Job that EPAF is setting up, or to which changes are applied

Suffix – Position suffix for the job in the EPAF

Terminology

- **Approval Category** - – Approval Categories represent the different types of EPAFs that can be selected by the originator based on the purpose of the specific personnel action.
- **Originator** - A person who creates the EPAF transaction. The originator submits the EPAF transaction for further action by the approvers designated in the routing queue. An EPAF can only be corrected by the originator who created it
- **Approver** - A person who reviews an EPAF, and either approves, disapproves, or returns the EPAF to the Originator for correction

Dates

- **Query Date** – The Query Date field appears at the beginning of every EPAF and automatically defaults to the date the EPAF is created. Use the first day of a month as your Query Date to avoid creating multiple timesheets during time entry. For rehires, the Query Date may be in the past.
- **Effective Date** - The date a change becomes effective in Banner. This date cannot be earlier than the last paid date of the employee
- **Last Paid Date** – This date can be found in PHILIST or the EPAF header

Approval Categories

- XAHIR
 - Hiring a student worker into their first job at the UO
 - Can only be used for people that have no employee record
- XAREH
 - Reopening an existing student position
 - The pooled position and suffix must match
- XAADD
 - Adding an additional student position
 - Used to add a job for someone that currently has an open position
 - May have to be used when the previous pooled position is different from the new position
 - E.g., the closed position is BAECNT, but you need to use BUOSRG
- XARATE
 - Updating the hourly rate on an existing student position
- TITLE
 - Updating the title on an existing student position
- XATERM – DO NOT USE
 - Terminating an existing student position
 - **Should be done via ESR in OnBase instead**

Approval Categories – cont'd

- Labor Distribution Changes
 - Updates labor distribution on an existing position
 - FUTURE ONLY; past is done in PHAREDS, not via EPAF
 - CLABOR – classified and temp
 - ULABOR – faculty and OAs
 - XALABR – student workers
 - XBLABR - GEs
- SUPER
 - Updating the supervisor on an existing position
 - All e-classes

Tip for All EPAFs

- Put the effective date you will be using into the Query Date field before starting to create the EPAF
- Any field in which you need to enter information can be queried.
 - Select the field, and click F9 –or– click the three dots that appear.
 - From there it will give you options for searching.
 - % is the wildcard.
 - When you find the information you need, double-click, click alt-S, or copy/paste, and it will then be entered for you.
 - Examples would be finding 95#, position, suffix, etc.
- Make sure you are using the correct position and suffix for any changes you are requesting.
- If you are setting up a position and the work location is outside of Oregon, be sure to complete this form:
<https://hr.uoregon.edu/remote-work-arrangements-logistical-considerations#outofstate>



Setting Up Student Positions via EPAF

Pooled Positions for Student Workers

- BUOSRG (student hourly)
- BUOSNS (student hourly non-system)
- BNXSRG (Library only)
- BNXSNS (Library non-system)
- BUORAR (UO RARE program)
- BUOSTI (Student stipend – generally RAs)
- BAECNT (AEC student notetaker)
- <https://ba.uoregon.edu/payroll/student-overview>

BUOSNS and BNXSNS

- Non-system student employees are students at non-VO institutions
 - Proof of enrollment is required
- BUOSNS is the pooled student hourly position for non-VO Students
 - BNXSNS is the non-system student hourly position for the Library only
- These positions are still set up via EPAF
- A new non-system student may not have a 95# yet
 - You will need a 95# to create an EPAF

BUOSNS and BNXSNS cont'd

- To get a 95#, please complete Section 1 of the Employee Information Form (EIF), and put your name and email address in the Authorization section.
 - <https://ba.uoregon.edu/payroll/payroll-administration/reports-and-forms>
- Send the EIF to us via our OneDrive. In the title of the document, put "95# request for non-system student", or something similar so it gets routed to the correct work folder
- Once the number is generated, we will send it to you via email so you can create the EPAF

Classifications for student hourly workers

- Per their CBA, student hourly workers now have three classifications
- These classifications are entered into the Grade field on the XAHIR, XAREH, XAADD, XARATE, and TITLE EPAFs
- <https://hr.uoregon.edu/student-worker-wage-and-classification-guide>

Classifications for student hourly workers, cont'd

NEW Classification
(Grade: S1, S2, S3)

List the classification, or “Grade” of the student worker's position. This must be formatted as S1, S2, or S3.

- S1 = Student Worker 1
- S2 = Student Worker 2
- S3 = Student Worker 3

- <https://hr.uoregon.edu/student-worker-wage-and-classification-guide#classifications>

Ranges for new student worker hourly rates

https://hr.uoregon.edu/sites/default/files/2025-05/Tentative%20Agreement%20-%20Wages%20and%20Job%20Categories_signed.pdf

WAGES AND JOB CATEGORIES

Section 1. Effective July 16, 2025, employee pay and job categories will be set accordingly:

Student Employee Classification Level	Pay Scale
Student Employee 1: Performs work requiring a combination of basic skills and some experience. Work is guided by applicable work principles and standardized techniques.	\$16.00 - \$19.50
Student Employee 2: Performs work requiring more specialized training. Typically requires experience and/or being on the job. Work is analytical, technical, and based on acquired skills. Uses discretion when making decisions.	\$16.40 - \$20.50
Student Employee 3: Performs duties requiring advanced specialized training. Works with greater independence than level 1 and 2 positions and may receive minimal supervision. Positions may be highly technical in nature and/or perform para-professional level work.	\$16.80 - Over \$21.00

New Student Position

- **XAHIR** – Student new hire
 - This is for students whose **employee status is not yet active in Banner**
 - This is a 2-part EPAF
 - Job Data
 - Labor Distribution
 - This category requires a departmental approver for processing
 - Use actual job start date as effective date
 - Enter accurate job location to ensure correct withholdings and minimum wage rates are applied to job
 - Some fields will auto populate with standard information for student positions
 - Settings to show 30 fields

New Student Position – Part 1

Electronic Personnel Action NOAEPAF 9.3.28 [UO.2] (TEST)

ADD RETRIEVE RELATED TOOLS

Pending Change: Proxy For: ID: 952181760 Tyrion Lannister Transaction: Query Date: 08/01/2025 Last Paid Date: Approval Category: XAHIR Student New Hire Approval Type: XAHIRE Student New Hire Start Over

Position: BUOSRG UO Student Regular Suffix: 00

Transaction Default Earnings Job Labor Distribution Routing MIS EJO3 E-mail Additional Identification Other Information and Comments

TRANSACTION Settings Insert Delete Copy Filter

Applied Status	Field Name	Current Value	New Value	Remove
	Job Begin Date*		08/01/2025	<input type="checkbox"/>
	Current Hire Date*		08/01/2025	<input type="checkbox"/>
	Jobs Effective Date*		08/01/2025	<input type="checkbox"/>
	Timesheet Orgn*		120100	<input type="checkbox"/>
	Home COAS*		B	<input type="checkbox"/>
	Home Organization*		120100	<input type="checkbox"/>
	Distribution Orgn*		431142	<input type="checkbox"/>
	Regular Rate*			21 <input type="checkbox"/>
	Job Location*		20D	<input type="checkbox"/>
	Job Change Reason*		FIXAB	<input type="checkbox"/>
	Job Status*		L	<input type="checkbox"/>
	Title*		Hand of the Queen	<input type="checkbox"/>
	Salary Grade*		S3	<input type="checkbox"/>
	Employee Class Code*		XA	<input type="checkbox"/>
	Payroll Id*		NP	<input type="checkbox"/>
	Step*			0 <input type="checkbox"/>
	Appointment Percent*		49	<input type="checkbox"/>
	FTE*		49	<input type="checkbox"/>
	Workers Comp Code*		8869	<input type="checkbox"/>
	Supervisor ID*		950375450	<input type="checkbox"/>
	Supervisor Position*		B99081	<input type="checkbox"/>
	Supervisor Suffix*		00	<input type="checkbox"/>
	Employee Status*		<input type="checkbox"/>	<input type="checkbox"/>
	I9 Form Indicator*		N	<input type="checkbox"/>
	Hours per Pay*		84.93	<input type="checkbox"/>

Next Action

Electronic Personnel Action NOAEPAF 9.3.28 [UO 2] (TEST)

Pending Change: Proxy For: ID: 952181780 Tyron Lanmaster Transaction: 293475 -Waiting Query Date: 08/01/2025 Last Paid Date: Approval Category: XAHIR - Student New Hire Approval Type: XAHIRE - Stu

Position: BUOSRG UO Student Regular Suffix: 00

Transaction	Default Earnings	Job Labor Distribution	Routing	MS EBS	E-mail	Additional Identification	Other Information and Comments
TRANSACTION							
Applied Status	Field Name	Current Value	New Value				
P	Job Begin Date*		08/01/2025				
P	Current Hire Date*		08/01/2025				
P	Jobs Effective Date*		08/01/2025				
P	Timesheet Orgn*		120100				
P	Home COAS*		B				
P	Home Organization*		120100				
P	Distribution Orgn*		431142				
P	Regular Rate*						
P	Job Location*		200				
P	Job Change Reason*		FIXAB				
P	Job Status*		L				
P	Title*		Hand of the Queen				
P	Salary Grade*		S3				
P	Employee Class Code*		XA				
P	Payroll Id*		NP				
P	Step*						
P	Appointment Percent*		49				
P	FTE*		.49				
P	Workers Comp Code*		8869				
P	Supervisor ID*		950375450				
P	Supervisor Position*		899081				
P	Supervisor Suffix*		00				
P	Employee Status*		A				
P	I9 Form Indicator*		N				
P	Hours per Pay*		84.93				

Activity Date 08/05/2025 11:38:14 AM Activity User KBARTOW1

SAVE

Search

ACTIONS

- Refresh F5
- Export Shift+F1
- Print Screenshot Ctrl+Alt+P
- Clear Record Shift+F4
- Clear Data Shift+F5
- Item Properties
- Display ID Image
- Exit Quickflow
- About Banner

OPTIONS

- Transaction
- Submit Transaction
- Apply Transaction
- Cancel PAF
- Delete PAF
- Next Action**
- Routing

New Student Position – Part 2

- Save
- Tools
 - Next action
 - Alt + page down to get to Labor Distribution
- **Effective Date in Labor Distribution should be same as Job Effective Date**

Electronic Personnel Action NOAEPAF 9.3.23 [UO 2] (TEST)

Pending Change: Proxy For: ID: 952123548 Tyrion Lanister Transaction: 274049 Waiting [Start Over](#)

Query Date: 02/01/2025 Last Paid Date: Approval Category: *XAHIR Student New Hire Approval Type: *XALBR Student Rehire Labor Dist

Position: BUOSRG UO Student Regular Suffix: 00

Transaction | Default Earnings | **Job Labor Distribution** | Routing | MIS EJO3 | E-mail | Additional Identification | Other Information and Comments

▼ CURRENT JOB LABOR DISTRIBUTION [Settings](#) [Insert](#) [Delete](#) [Copy](#) [Filter](#)

Effective Date 02/01/2025

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

Record 1 of 1

▼ NEW JOB LABOR DISTRIBUTION [Settings](#) [Insert](#) [Delete](#) [Copy](#) [Filter](#)

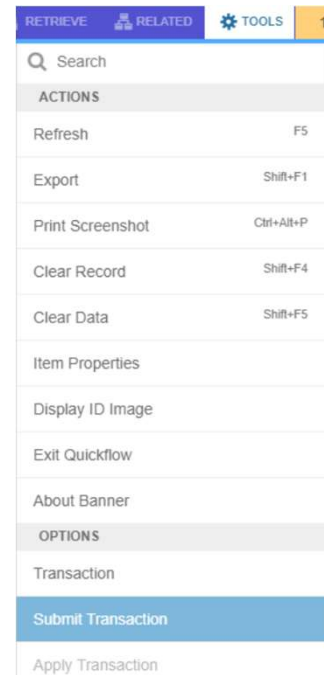
Effective Date * 02/01/2025

COA *	Index	Fund *	Organization *	Account *	Program *	Activity	Location	Project	Cost	Percent *	Enc End Date
B		001100	222555	10501	1ADM					100.00	
										Total Percent	100.00

Record 1 of 1

Final Step

After saving, go to the Tools menu, and select **Submit Transaction**, then save again.



Common Error Message You May Receive with XAHIR

When submitting an XAHIR EPAF, you might get the following error:

User ID: KBARTOW1 Proxy For: MIKEK Michael Kasahun Submitted From Date: Submitted To Date: Transaction Status: All Queue Status: All Start Over

Transaction Information					Other information and Comments					Errors				
▼ TRANSACTIONS WITH ERRORS AND WARNINGS Settings Insert Delete Copy Filter														
ID	Name	Transaction No *	Approval Category *	Description										
951894331	Jack Hemenway Button	289897	XAHIR	Student New Hire										
10 Per Page Record 1 of 1														
▼ ERRORS AND WARNINGS INFORMATION Settings Insert Delete Copy Filter														
Approval Type	Error Type	Errors and Warnings information												
XAHIRE	ERROR	First Name, SSN/SIN or Birth Date are incomplete, or Sex Code is invalid. Review GTVLGSX for valid values.												
XAHIRE	WARNING	*WARNING* Encumbrance has been set to 0, because method is Hours Input.												
10 Per Page Record 1 of 1														

- This means that one or more of the following fields are blank in Banner:
 - SSN, DOB, and/or citizenship.
- If this happens, **you will be unable to fix it yourself**.
 - To fix, send an email to payroll@uoregon.edu with the name and UO ID number, and we can put in placeholders so you can move forward with submitting.

Rehire

- **XAREH** – Students only
 - This is a 2-part EPAF
 - Job Data
 - Labor Distribution
 - This EPAF will can activate terminated employee status
 - This category requires a departmental approver for processing
 - Use actual hire date for the job's effective date
 - Enter job location accurately to ensure correct withholdings and minimum wage rates are applied to job
 - Some fields will auto populate with standard information for student positions
 - Settings to show 30 fields

Rehire – Part 1

Electronic Personnel Action NOAEPAF 9.3.28 [UO 2] (TEST)

Pending Change: Proxy For: ID: 952181780 Tyron Lannister Transaction: 293476 Waiting Query Date: 10/01/2025 Last Paid Date: Saved successfully (31 rows saved)

Approval Category: XAREH Rehire a Student Approval Type: XAJOB Student Rehire Job Assignment Position: BUOSRG UO Student Regular Suffix: 00

Transaction | Default Earnings | Job Labor Distribution | Routing | MIS EJ03 | E-mail | Additional Identification | Other Information and Comments

Applied Status	Field Name	Current Value	New Value	Remove
P	Jobs Effective Date*	08/01/2025	10/01/2025	<input type="checkbox"/>
P	Timesheet Orgn*	120100	530000	<input type="checkbox"/>
P	Home Organization*	120100	530000	<input type="checkbox"/>
P	Distribution Orgn*	431141	431141	<input type="checkbox"/>
P	Contract Type*	P	P	<input type="checkbox"/>
P	Regular Rate*		21	17 <input type="checkbox"/>
P	Job Location*	20D	20D	<input type="checkbox"/>
P	Job Change Reason*	FIXAB	FIXAR	<input type="checkbox"/>
P	Job Status*	A	A	<input type="checkbox"/>
P	Employee Class Code*	XA	XA	<input type="checkbox"/>
P	Grade*	Hand of the Queen	Trap Setter	<input type="checkbox"/>
P	Payroll Id*	MO	MO	<input type="checkbox"/>
P	Employer Code*	UO	UO	<input type="checkbox"/>
P	COA Code*	B	B	<input type="checkbox"/>
P	Salary Grade*	S3	S1	<input type="checkbox"/>
P	Step*		0	0 <input type="checkbox"/>
P	Salary Group	202507	202507	<input type="checkbox"/>
P	Appointment Percent*	49	49	<input type="checkbox"/>
P	FTE*	0.49	.49	<input type="checkbox"/>
P	Hours per Day*	8	8	<input type="checkbox"/>
P	STRS Assignment Code*		12	<input type="checkbox"/>
P	Factor*	12	12	<input type="checkbox"/>
P	Pays*	12	12	<input type="checkbox"/>
P	Employee Status*	A	A	<input type="checkbox"/>
P	Accru Leave*	Y	Y	<input type="checkbox"/>
P	Hours per Pay*	84.93	84.93	<input type="checkbox"/>
P	Workers Comp Code*	8869	9101	<input type="checkbox"/>
P	Supervisor ID*	950375450	950375450	<input type="checkbox"/>
P	Supervisor Position*	B99081	B99081	<input type="checkbox"/>
P	Supervisor Suffix*	00	00	<input type="checkbox"/>

* - indicates a required field. Press LIST for valid codes.

30 | Per Page Record 30 of 31

Next Action

Electronic Personnel Action NOAEPAF 9.3.28 [UO 2] (TEST)

Pending Change: Proxy For: ID: 952181780 Tyrion Lannister Transaction: 293476 Waiting Query Date: 10/01/2025 Last Paid Date:

Approval Category: XAREH Rehire a Student Approval Type: XAJOB Student Rehire Job Assignment Position: BUOSRG UO Student Regular Suffix: 00

Transaction	Default Earnings	Job Labor Distribution	Routing	Miss E Jobs	E-mail	Additional Identification	Other Information and Comments
- TRANSACTION							
Applied Status	Field Name	Current Value	New Value				
P	Jobs Effective Date*	08/01/2025	10/01/2025				
P	Timesheet Orgin*	120100	530000				
P	Home Organization*	120100	530000				
P	Distribution Orgin*	431141	431141				
P	Contract Type*	P	P				
P	Regular Rate*		21				
P	Job Location*	200	200				
P	Job Change Reason*	FIXAB	FIXAR				
P	Job Status*	A	A				
P	Employee Class Code*	XA	XA				
P	Title*	Hand of the Queen	Trap Setter				
P	Payroll Id*	MO	MO				
P	Employer Code*	UO	UO				
P	COA Code*	B	B				
P	Salary Grade*	S3	H				
P	Step*		0				
P	Salary Group	202507	202507				
P	Appointment Percent*	49	49				
P	FTE*	0.49	.49				
P	Hours per Day*	8	8				
P	STRS Assignment Code*		12				
P	Factor*	12	12				
P	Pays*	12	12				
P	Employee Status*	A	A				
P	Accrue Leave*	Y	Y				
P	Hours per Pay*	84.93	84.93				

Activity Date: 08/05/2025 11:52:16 AM Activity User: KBARTOW1

SAVE

Search

ACTIONS

Refresh FS

Export Shift+F1

Print Screenshot Ctrl+Alt+P

Clear Record Shift+F4

Clear Data Shift+F5

Item Properties

Display ID Image

Exit Quickflow

About Banner

OPTIONS

Transaction

Submit Transaction

Apply Transaction

Cancel PAF

Delete PAF

Next Action

Routing

Rehire – Part 2

- Save
- Tools
 - Next action
 - Alt + page down to get to Labor Distribution
- Effective Date in Labor Distribution should be same as Job Effective Date

Electronic Personnel Action NOA/EPAI- 93.23 [UO2] (TEST)

Pending Change: Proxy For: ID: 952123548 Tyrion Lanister Transaction: 274050 Waiting Query Date: 07/01/2025 Last Paid Date: Start Over

Approval Category: XAREH Rehire a Student Approval Type: XALBR Student Rehire Labor Dist Position: BUOSRG UO Student Regular Suffix: 00

Transaction | Default Earnings | **Job Labor Distribution** | Routing | MIS EJ03 | E-mail | Additional Identification | Other Information and Comments

▼ CURRENT JOB LABOR DISTRIBUTION Settings Insert Delete Copy Filter

Effective Date 02/01/2025

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Enc End Date
B	BPOPXX	001100	223511	10501	01001	BGEN				100.00	

1 of 1 | 4 Per Page | Record 1 of 1

▼ NEW JOB LABOR DISTRIBUTION Settings Insert Delete Copy Filter

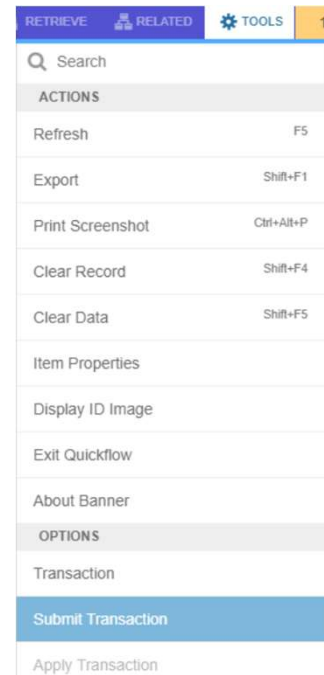
Effective Date * 07/01/2025

COA *	Index	Fund *	Organization *	Account *	Program *	Activity	Location	Project	Cost	Percent *	Enc End Date
B	BZDOPX	001100	223411	10501	01001	BGEN				100	
Total Percent										100.00	

1 of 1 | 4 Per Page | Record 1 of 1

Final Step

After saving, go to the Tools menu, and select **Submit Transaction**, then save again.



Contract Type Issue with XAREH EPAF

- If the Contract Type field is blank or gives an error, you will need to put in either P (primary) or S (secondary)
 - You should pick the option that matches the job you are reopening
 - You can check to see if the position is primary or secondary in PWIVERI before creating your EPAF

Applied Status	Field Name	Current Value	New Value
	Jobs Effective Date*		10/01/2025
	Timesheet Orgn*		
	Home Organization*	430000	
	Distribution Orgn*	430000	
	Contract Type*		P or S
	Regular Rate*		
	Job Location*		20D
	Job Change Reason*		FIXAR
	Job Status*		A

Additional Job

- **XAADD** – Additional Job
 - Use the next available suffix
 - This is a 2-part EPAF
 - Job Data
 - Labor Distribution
 - This category requires a departmental approver for processing
 - Use Actual Hire Date for Jobs Effective Date
 - Enter job location to ensure correct withholdings and minimum wage rates are applied to job.
 - Some fields will auto populate with standard information for student positions.
 - Workers Comp Code for students – 9101
 - Settings to show 30 fields

Additional Job – Part 1

Electronic Personnel Action NOAEPAF 9.3.26 [UO:2] (TEST)

ADD RETRIEVE RELATED TOOLS

Pending Change: Proxy For: ID: 952181780 Tyrion Lannister Transaction: Query Date: 09/01/2025 Last Paid Date: Approval Category: XAADD Student Additional Job Approval Type: XAADD Student Additional Job [Start Over](#)

Position: BUOSRG UO Student Regular Suffix: 01

Transaction Default Earnings Job Labor Distribution Routing MIS EJO3 E-mail Additional Identification Other Information and Comments

Applied Status	Field Name	Current Value	New Value	Remove
	Job Begin Date*		09/01/2025	<input type="checkbox"/>
	Accrue Leave*		Y	<input type="checkbox"/>
	Jobs Effective Date*		09/01/2025	<input type="checkbox"/>
	Appointment Percent*		49	<input type="checkbox"/>
	FTE*		.49	<input type="checkbox"/>
	Job Change Reason*		FIXAB	<input type="checkbox"/>
	Step*			<input type="checkbox"/>
	Integration*			<input type="checkbox"/>
	Hours per Pay*		64.93	<input type="checkbox"/>
	Transaction Origin*		223250	<input type="checkbox"/>
	Job Location*		20D	<input type="checkbox"/>
	Job Status*		A	<input type="checkbox"/>
	Contract Type*		Lab Assistant	<input type="checkbox"/>
	Standard Compensation Code*		S	<input type="checkbox"/>
	Supervisor ID*		8668	<input type="checkbox"/>
	Supervisor Position*		950375450	<input type="checkbox"/>
	Supervisor Salary*		B99801	<input type="checkbox"/>
	Supervisor Suffix*		00	<input type="checkbox"/>
	Supervisor Status*		S3	<input type="checkbox"/>

* - Indical

APPROVER

Additional Job – Part 2

- Save
- Tools
 - Next action
 - Alt + page down to get to Labor Distribution
- Effective Date in Labor Distribution should be same as Job Effective Date

ellucian Electronic Personnel Action NOAEPAF 9.3.23 [UO.2] (PROD)

Pending Change: Proxy For: ID: Transaction: Waiting [Start Over](#)

Query Date: Last Paid Date:

Approval Category: * Student Additional Job Approval Type: * Student Rehire Labor Dist

Position: UO Student Regular Suffix:

Transaction | Default Earnings | **Job Labor Distribution** | Routing | MIS EJ03 | E-mail | Additional Identification | Other Information and Comments

▼ CURRENT JOB LABOR DISTRIBUTION Settings Insert Delete Copy Filter

Effective Date

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

Record 1 of 1

▼ NEW JOB LABOR DISTRIBUTION Settings Insert Delete Copy Filter

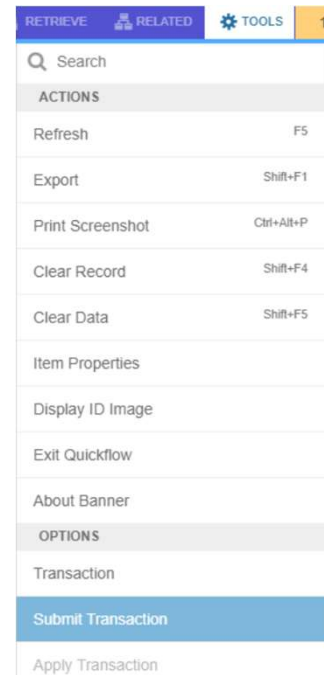
Effective Date *

COA *	Index	Fund *	Organization *	Account *	Program *	Activity	Location	Project	Cost	Percent *	Enc End Date
B	BCPOPX	001100	222025	10501	01001	BGEN				100.00	
										Total Percent	100.00

Record 1 of 1

Final Step

After saving, go to the Tools menu, and select **Submit Transaction**, then save again.



XAREH vs XAADD

- XAREH is to reopen an existing, but closed, student position
 - The EPAF reopens the position **and** can also reactivate employee status
 - **It can only reopen an existing position**
- XAADD is to add an additional position for someone that currently has an open student position
 - This EPAF **does not reactivate employee status**; this should be used for employees with active employee status
- If the closed pooled position and the new pooled position do not match, you may need to use XAADD instead of XAREH
 - E.g., If their previous – CLOSED – student position was BNXSRG, but you are hiring them into BUOSRG, you will be unable to use XAREH because the position you want to “reopen” does not yet exist
- **Instructions for this situation are on the next two slides**

Instructions for using XAADD instead of XAREH

If the previous position that you need to reopen is a different pooled position than the new position, XAREH will not work. XAREH can only reopen existing positions. This means you will need to use XAADD instead, because you are adding a new position.

However, XAADD cannot reactivate terminated employee status, and so you will get an error message there as well – unless you follow the steps below:

- If you already created an XAADD but got an error message, go to step 2. If not, go to step 3.
- Step 2 - Void the XAREH EPAF; it will not work.
- Step 3 - Create an XAADD EPAF; no special instructions pre-submitting.

Continued on next slide

Instructions for using XAADD instead of XAREH – cont'd

- ★ **BEFORE YOU SUBMIT the XAADD EPAF**, you will need to email payroll@uoregon.edu and give the following information:
 - The start date and timesheet org of the new position.
 - We will manually reactivate employee status so the XAADD EPAF will be successful.
 - Once employee status is reactivated, then you can submit the XAADD EPAF.

A few more notes for this situation in general:

- Us reactivating the employee status does not mean new hire documents are not required, just like an XAREH EPAF reactivating the employee status as part of the process does not indicate whether or not those documents are needed.
- If you are unsure whether a returning employee needs a new I-9, W-4s, etc., please feel free to reach out.
- **Questions or issues when in this situation?**
 - Contact payroll@uoregon.edu for help
 - We are working to create new EPAF categories to serve every situation, but are not done yet

Known Issue with EPAFs that include the Supervisor Field

- The supervisor you enter must have an open position in the same timeframe of the effective date on the EPAF
 - If they don't have an open position, the EPAF will fail
 - E.g., if the effective date on the EPAF is 7/1, but the supervisor does not have an open position in July, the EPAF will fail
 - E.g., If you are using a 9-month faculty member with a 9/16 – 6/15 appointment as the supervisor on a student EPAF with an effective date between 6/16 – 9/15, it will fail
 - Since the effective date of the EPAF falls on a date on which the chosen supervisor does not have an open position, Banner will not accept it
- The workaround if the chosen supervisor does not have an open position is to use a different supervisor, and then update it when the preferred supervisor is back to having an active position

Tips and Reminders for Student EPAFs

- XAHIR is **not** for additional jobs, even if it's a different e-class than the existing position. This should be used for students **without any employee status**.
- XAREH is used to reopen an existing position.
 - XAREH can also reactivate terminated employee status
- XAADD is used to add a new student position to an active employee.
- Always check PWIVERI first to ensure you are choosing the appropriate EPAF category.
- Make sure the submitter and approver are in communication so there are no delays.
- After the EPAF deadline, changes need to be effective the first of the next month or later.
 - <https://ba.uoregon.edu/payroll/hris-deadlines>

Submitting Hire Documents

- If hire documents are necessary for a student worker you are hiring via EPAF, you will also need to submit those documents to Payroll via our OneDrive
 - https://uoregon-my.sharepoint.com/:f:/g/personal/payroll_uoregon_edu/EvZ2ogthFaZNt9GaQZq2XogBU8_JFVcjNW8CgTotuGtD4A
- When sending in any documents to the Payroll OneDrive, please name the file as follows:
 - “Employee Name – Employee Type”
 - E.g., “Doerksen, Austin – OA”
 - This facilitates sorting so the docs go to the correct working folder, and expedites processing times
- Bundled packets and individual forms are available on our Forms page
 - <https://ba.uoregon.edu/payroll/payroll-administration/reports-and-forms>



Job Change EPAFs

Rate Change

- **XARATE** – Student
 - This approval category requires departmental approver for processing
 - If rate is \$21.01 or more, complete the following form for approval:
https://oregon.qualtrics.com/jfe/form/SV_7UO3nifImU5d9ki
 - Pay attention to the last paid date – the effective date you use must be at least one day *after* the last paid date

Rate Change, cont'd

- XARATE – continued
- You can change both the rate and the grade using this EPAF.
 - You may choose to change one or the other, or both

Illucian Electronic Personnel Action NOAEPAF 9.3.28 [UO.2] (PROD) ADD RETRIEVE RELAT

Pending Change: Proxy For: ID: 951429400 Adrian Janelle Hartvigsen Transaction: Query Date: 05/01/2026 Last Paid Date: 07/31/2019

Approval Category: XARATE Student Rate Change Approval Type: RATE Rate Change Position: BUOSRG Student Regular Suffix: 00

Transaction Default Earnings Job Labor Distribution Routing MIS EJ03 E-mail Additional Identification Other Information and Comments

TRANSACTION Settings Insert De

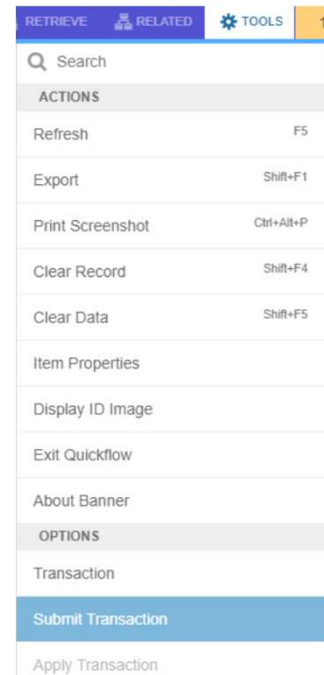
Applied Status	Field Name	Current Value	New Value	Rem
	Jobs Effective Date*	09/30/2019	05/01/2026	
	Regular Rate*		11.75	19
	Job Change Reason*	TERMJ	PSALO	
	Salary Grade	H	S2	

* indicates a required field. Press LIST for valid codes.

1 of 1 10 Per Page

Final Step

After saving, go to the Tools menu, and select **Submit Transaction**, then save again.



TITLE – Update the title on an existing XA position

- This EPAF is for XA positions only.

Title Change

Electronic Personnel Action NOAEPAF 9.3.23 [UO.2] (PROD)

Pending Change: Proxy For: ID: [REDACTED] Transaction: Query Date: 02/01/2025 Last Paid Date: 02/28/2025 [Start Over](#)

Approval Category: TITLE Title Change Approval Type: HRTITL Title Change Position: BUOSRG UO Student Regular Suffix: 00

Transaction | Default Earnings | Job Labor Distribution | Routing | MIS EJ03 | E-mail | Additional Identification | Other Information and Comments

Settings | Insert | Delete | Copy | Filter

Applied Status	Field Name	Current Value	New Value	Remove
	Jobs Effective Date	07/01/2024	02/01/2025	<input type="checkbox"/>
	Personnel Date	07/01/2024	01/01/2025	<input type="checkbox"/>
	Title	UO Student Regular	Ranger	<input checked="" type="checkbox"/>
	Job Change Reason	GJMNT	HCTTL	<input type="checkbox"/>

1 of 1 | 10 Per Page | Record 3 of 4

APPROVER | Insert | Delete | Copy | Filter

Approver Action: None | Queue Status: []

Title Change, cont'd

- **TITLE** – continued
- You can change both the title and the grade using this EPAF.
 - You may choose to change one or the other, or both

Pending Change: Proxy For: ID: 951429400 Adrian Janelle Hartvigsen Transaction: Query Date: 05/01/2026 Last Paid Date: 07/31/2019

Approval Category: TITLE Title Change Approval Type: HRTITL Title Change Position: BUOSRG Student Regular Suffix: 00

Transaction Default Earnings Job Labor Distribution Routing MIS EJ03 E-mail Additional Identification Other Information and Comments

▼ TRANSACTION Settings Inser

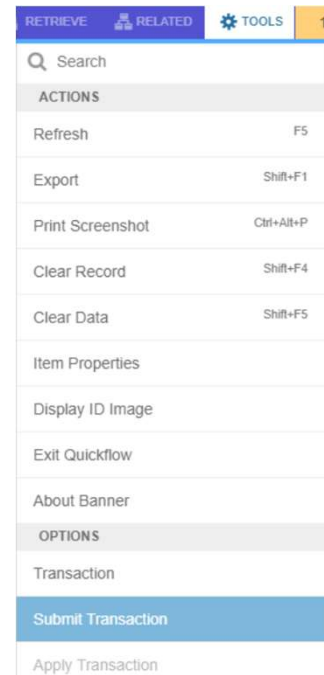
Applied Status	Field Name	Current Value	New Value
	Jobs Effective Date	09/30/2019	05/01/2026
	Personnel Date	09/30/2019	04/16/2026
	Title	UO Student Regular	Lab Supervisor
	Job Change Reason	TERMJ	HCTTL
	Salary Grade	H	S3

Press LIST for valid codes.

1 of 1 10 Per Page

Final Step

After saving, go to the Tools menu, and select **Submit Transaction**, then save again.



Effective Date for Changes

Use the 1st of the month for query date or multiple time sheets will be created, one for each new labor distribution.

- If any date except for the first of the month is used, there will be two timesheets in PHAHOUR
 - One timesheet for the 1st of the month - day before selected effective date
 - One timesheet for the selected effective date – end of the month
 - If this method is chosen, be sure the correct hours are put on each timesheet
- If the first is used as the effective date but you need to enter a different rate or LD for part of the month, you can do so in PHAHOUR even though there is only one timesheet.
 - For rate changes, you can use the special rate earn code for hours that are not supposed to be at the new rate.
 - For LD changes, you can split the hours on the timesheet and edit the LD for each set of hours.

Both methods listed above are correct; which you choose is up to you in the department/unit. Use the method that works best for the submitters and the person doing time entry to cut down on errors.

Effective Date vs. Personnel Date

- The effective date is the date used to make the change in Banner
 - The personnel date is the date the change *actually* took place
 - They can be the same or different
-
- You might choose to use a different personnel date if the last paid date on the position does not allow you to use the actual date of the change as the effective date

Terminations

XATERM – Student job termination

OBSOLETE; USE ESR IN ONBASE INSTEAD

Employee Separation Requests

- We have phased out the XATERM EPAF and encourage you to use an Employee Separation Request (ESR) instead.
- ESRs are submitted via OnBase (DuckDocs) and have more features than the XATERM EPAF.
- Login and find information here:
 - <https://blogs.uoregon.edu/duckdocs/>
- ESR training in MyTrack here:
 - <https://uomytrack.pageuppeople.com/learning/3802>



EPAFs for All E-Classes

Labor Distribution Changes

- CLABOR – Classified
 - E-class starts with C% or TS
 - ULABOR – Unclassified
 - E-class starts with F% or A%
 - XALABR – Student
 - XBLABR – Graduate Employee
-
- Use the 1st of the month for query date or multiple time sheets will be created, one for each new labor distribution.

Labor Distribution Changes

Electronic Personnel Action Form NOAEPAF 9.3.9 [UO.1] (TEST)

Pending Change: Proxy For: [REDACTED] Transaction: 83314 Waiting Start Over

Query Date: 11/01/2018 **Last Paid Date: 10/31/2018**

Approval Category: CLABOR Classified Labor Distribution Approval Type: LABOR Labor Distribution Change

[REDACTED] Suffix: 00

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

▼ CURRENT JOB LABOR DISTRIBUTION Insert Delete Copy Filter

Effective Date 04/01/2018

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Enc End Date
B	SBADIR	001100	431110	10301	61001					100.00	

1 of 1 | 4 Per Page | Record 1 of 1

▼ NEW JOB LABOR DISTRIBUTION Insert Delete Copy Filter

Effective Date * 11/01/2018

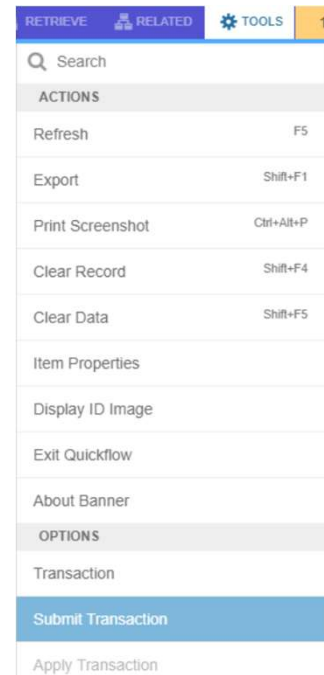
COA *	Index	Fund *	Organization *	Account *	Program *	Activity	Location	Project	Cost	Percent *	Enc End Date
B	SBAPAY	001100	431140	10301	61001					100.00	
Total Percent										100.00	

1 of 1 | 4 Per Page | Record 1 of 1

Current Labor Distribution will display on top
Changes are entered in fields at the bottom

Final Step

After saving, go to the Tools menu, and select **Submit Transaction**, then save again.



Supervisor Update

- **SUPER** – all employees
- Use actual date of change for Personnel Date. This can be prior to the Query Date and Jobs Effective Date.

ellucian Electronic Personnel Action Form NOAEPAF 9.3.9 [UO.1] (TEST) ADD RETRIEVE RELATED TOOLS 1

Pending Change: Proxy For: [REDACTED] ver Transaction: 83317 Waiting Query Date: 01/11/2019 Last Paid Date: 10/31/2018 Start Over

Approval Category: SUPER Supervisor Update Approval Type: SUPER Supervisor Update [REDACTED] nt Suffix: 00

Transaction	Default Earnings	Job Labor Distribution	Routing	Other Information and Comments
TRANSACTION Insert Delete Copy Filter				
Applied Status	Field Name	Current Value	New Value	Remove
P	Jobs Effective Date*	01/01/2018	11/01/2018	<input type="checkbox"/>
P	Personnel Date*	01/01/2018	11/01/2018	<input type="checkbox"/>
P	Job Change Reason*	BREAP	HSUPU	<input type="checkbox"/>
P	Supervisor ID*	[REDACTED]	[REDACTED]	<input type="checkbox"/>
P	Supervisor Position*	[REDACTED]	[REDACTED]	<input type="checkbox"/>
P	Supervisor Suffix*	00	00	<input type="checkbox"/>

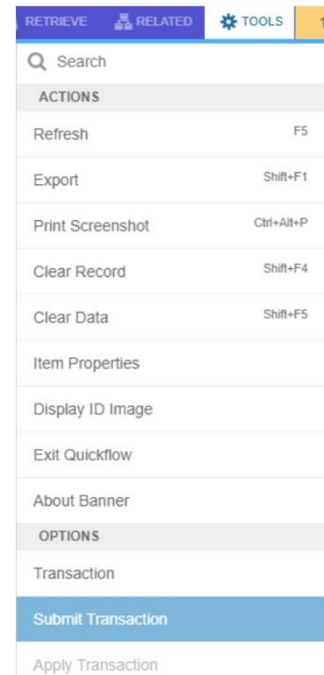
* - indicates a required field.

1 of 1 Per Page Record 1 of 6

APPROVER
Approver Action <input type="text" value="None"/> Queue Status

Final Step

After saving, go to the Tools menu, and select **Submit Transaction**, then save again.



Known Issue with Supervisor Updates

- The supervisor you enter has to have an open position in the same timeframe of the effective date on the EPAF
 - If they don't have an open position, the EPAF will fail
 - E.g., if the effective date on the EPAF is 7/1, but the supervisor does not have an open position in July, the EPAF will fail
 - E.g., If you are using a 9-month faculty member with a 9/16 – 6/15 appointment as the supervisor on a student EPAF with an effective date between 6/16 – 9/15, it will fail
 - Since the effective date of the EPAF falls on a date on which the chosen supervisor does not have an open position, Banner will not accept it
- The workaround if the chosen supervisor does not have an open position is to use a different supervisor, and then update it when the preferred supervisor is back to having an active position

Supervisor Record Auditing

- Human Resources has information and instructions on maintaining accurate supervisor records on positions.
 - <https://hr.uoregon.edu/supervisor-record-maintenance>
- Contact hrops@uoregon.edu with questions.

Effective Date for Changes

Use the 1st of the month for query date or multiple time sheets will be created, one for each new labor distribution.

- If any date except for the first of the month is used, there will be two timesheets in PHAHOUR
 - One timesheet for the 1st of the month - day before selected effective date
 - One timesheet for the selected effective date – end of the month
 - If this method is chosen, be sure the correct hours are put on each timesheet
- If the first is used as the effective date but you need to enter a different rate or LD for part of the month, you can do so in PHAHOUR even though there is only one timesheet.
 - For rate changes, you can use the special rate earn code for hours that are not supposed to be at the new rate.
 - For LD changes, you can split the hours on the timesheet and edit the LD for each set of hours.

Both methods listed above are correct; which you choose is up to you in the department/unit. Use the method that works best for the submitters and the person doing time entry to cut down on errors.



What Happens After Submission

What happens after I submit my EPAF?

- After saving and submitting an EPAF, it is electronically routed to the next person in the routing queue. That may be a departmental approver or a Payroll employee.
- The EPAF is reviewed and either approved, returned for correction or disapproved.
- Approved transactions are applied by an AppWorx at 12 PM and 5 PM each weekday.

NOAAPSM

ellucian Electronic Personnel Action Form 9.3.9 [UO.1] (TEST) ADD RETRIEVE RELATED TOOLS

Pending Change: Proxy For: ID: ██████████ Transaction: 83274 Pending [Start Over](#)

Query Date: 01/08/2019 Last Paid Date: 12/31/2017

Approval Category: XAREH Rehire a Student Approval Type: XAJOB Student Rehire Job Assignment Position: BUOSTI UO Student Stipend Suffix: 00

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

ROUTING [+](#) Insert [-](#) Delete Copy Filter

Originator ID: SHELBYC Shelby Leigh Cooper

Level Code *	Level	User ID	Name	Required Action *	Queue Status	Action Date
DEPTHC		10 CATHY1	Cathy Jane Denver	Approval	Pending	
XAPAY		95 BKANE	Benjamin S Kane	Approval	In Queue	
APPLY		99 SHELBYC	Shelby Leigh Cooper	Apply	In Queue	

1 of 1 Per Page Record 1 of 3

NOAAPSM – Electronic Approval Summary Form

The screenshot shows a web application window titled "ellucian Electronic Approval Summary Form NOAAPSM 9.3.5 (TEST)". The interface includes a search form with the following fields and controls:

- User ID:** CATHY1
- Proxy For:** [Empty text box] ...
- Submitted From:** [Empty text box] [Calendar icon]
- Submitted To Date:** [Empty text box] [Calendar icon]
- Transaction Status:** * Pending [Dropdown arrow]
- Queue Status:** * Pending [Dropdown arrow]
- Go:** [Button]

A grey instruction bar at the bottom of the form reads: "Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER."

- Use the NOAAPSM form to check the status of your EPAF
- Change "Transaction Status" and "Queue Status" to find transactions.
- Search can be limited by date of submission and transaction status
- Results are searchable.

Workflow Info

- In NOAAPSM, you can check on the following and more by scrolling to the right:
 - Which workflow an EPAF is in
 - Who submitted the EPAF
 - Who took action for an EPAF
 - Dates of action

Electronic Approval Summary NOAAPSM 9.3.17 (TEST)

User ID: KBARTOW1 Proxy For: Submitted From Date: Submitted To Date: Transaction Status: All Queue Status: All

Transaction Information Other Information and Comments Errors

TRANSACTION INFORMATION

ID	Name	Approval Category	Description	Approver Action *	Apply	Queue Status	Required Action Indicator	Transaction Number	Transaction Created On	Transaction Status
951408033	Roben Dale Nuiuk Itchoak	XBLABR	GTF Labor Distribu...	None	<input type="checkbox"/>			70797	01/24/2017	Void
951222723	Leslie Elizabeth Roos	XBLABR	GTF Labor Distribu...		<input type="checkbox"/>			72347	03/16/2017	Complete
951504274	Ilan Daniel Weinschelbaum	XBLABR	GTF Labor Distribu...		<input type="checkbox"/>			76214	08/18/2017	Disapproved
951333389	Valeska X Ramirez	XBLABR	GTF Labor Distribu...		<input type="checkbox"/>			77515	10/02/2017	Complete
951496323	Megan Victoria Olivera	XBLABR	GTF Labor Distribu...		<input type="checkbox"/>			77523	10/03/2017	Complete
951575868	Alonso Delfin Ares de Parga	XBLABR	GTF Labor Distribu...		<input type="checkbox"/>	In the Queue	Approve	77843	10/09/2017	Waiting
951631199	Emily Sara Buckberg	XBLABR	GTF Labor Distribu...		<input type="checkbox"/>			82618	01/21/2018	Complete
951035862	Kerry Anne Edinger Snod...	XBLABR	GTF Labor Distribu...		<input type="checkbox"/>			82621	01/21/2018	Complete
951638957	Katie R Fields	XBLABR	GTF Labor Distribu...		<input type="checkbox"/>			83278	02/07/2018	Complete
951366467	Ignas Lekavicius	XBLABR	GTF Labor Distribu...		<input type="checkbox"/>			83318	02/08/2018	Complete
951268208	Mayra Magali Amezcua	XBLABR	GTF Labor Distribu...		<input type="checkbox"/>			83319	02/08/2018	Complete
951638957	Katie R Fields	XBLABR	GTF Labor Distribu...		<input type="checkbox"/>			83338	02/09/2018	Complete
951297279	Kathryn Dianne Warden	XBLABR	GTF Labor Distribu...		<input type="checkbox"/>			84892	04/06/2018	Complete

Workflow Info cont'd

- View after scrolling examples:

Queue Status	Required Action Indicator	Transaction Number	Transaction Created On	Transaction Status
		70797	01/24/2017	Void
		72347	03/16/2017	Complete
		76214	08/18/2017	Disapproved
		77515	10/02/2017	Complete
		77523	10/03/2017	Complete
In the Queue	Approve	77843	10/09/2017	Waiting
		82618	01/21/2018	Complete
		82621	01/21/2018	Complete
		83278	02/07/2018	Complete
		83318	02/08/2018	Complete
		83319	02/08/2018	Complete
		83338	02/09/2018	Complete

Approved By ID	Activity Date	Submitted On	Application Date	Applied to Database By	Originator ID
					YRAHMANI
KBARTOW1		03/16/2017	03/17/2017	SHELBYC	LMCHOLM
		08/18/2017			SHERILYN
KBARTOW1		10/02/2017	10/03/2017	SHELBYC	JKOSTICK
KBARTOW1		10/03/2017	10/04/2017	SHELBYC	JKOSTICK
	10/09/2017				SHERILYN
KBARTOW1		01/21/2018	01/22/2018	SHELBYC	MARSHAG
KBARTOW1		01/21/2018	01/22/2018	SHELBYC	MARSHAG
KBARTOW1		02/07/2018	02/12/2018	SHELBYC	MARSHAG
KBARTOW1		02/08/2018	02/12/2018	SHELBYC	MYERS2
KBARTOW1		02/08/2018	02/12/2018	SHELBYC	MYERS2
KBARTOW1		02/09/2018	02/14/2018	SHELBYC	MARSHAG
KBARTOW1		04/06/2018	04/09/2018	SHELBYC	TROWE

Record 1 of 111

Transaction Status

- Transaction Statuses
 - **Waiting** – The EPAF transaction is in the process of being created by the originator and has not been submitted for approval.
 - **Pending** – The EPAF transaction requires an action by the approver
 - **Return for Correction** – The EPAF transaction has been returned to the originator by an approver. The originator will need to change data on the EPAF, save, and resubmit the transaction.
 - **Disapproved** – The EPAF is removed from the routing queue. A new EPAF will need to be submitted if the change is still needed.
 - **Approved** – The EPAF transaction has been approved by all necessary approvers but has not been applied to the database by payroll.
 - **Complete** – The EPAF transaction has been applied to the database.
 - **Void** – The originator has voided the EPAF transaction, and it is no longer valid. Only originators can void an EPAF


EPAF Reminders – Checking Status

- Be sure to check the Errors tab when looking at your EPAFs in NOAAPSM
- Don't assume an EPAF has been applied just because the status is Approved
 - Check PWIVERI
 - Run a roster in PWIPAYR
 - Run an Hours Entered report in PWIPAYR
 - Run PWRPRMR
- **Approved** – The EPAF transaction has been approved by all necessary approvers but has not been applied to the database by payroll
 - Banner has not been updated at this point
 - Check the Errors tab in NOAAPSM to see if there are issues
- **Complete** – The EPAF transaction has been applied to the database.

Viewing or Adding Comments

- Comments can be added to help people in the workflow understand the desired actions and outcomes
 - You can add comments for the approver
 - Instructions for correction can be added
 - Clarification as to why an EPAF was disapproved can be added

The screenshot displays the 'Electronic Approval Summary' interface for 'NOAAPS 9.3.17 (PROD)'. The user is logged in as 'ellucian'. The interface shows a table with columns for 'User ID', 'Proxy For', 'Submitted From Date', 'Submitted To Date', 'Transaction Status', and 'Queue Status'. The 'Submitted From Date' field is highlighted with a green circle. Below the table, there are sections for 'OTHER INFORMATION' and 'COMMENTS'. The 'COMMENTS' section is highlighted with a green circle and contains the following text: 'You can add comments to an EPAF here. Once saved, anyone with access to view that EPAF can see the comments. If an EPAF is sent back to you for correction, the comments will indicate why and what to do next.' A green checkmark in the top right corner indicates 'Saved successfully (1 rows saved)'. The bottom of the screen shows a pagination bar with '1 of 1' and 'Per Page'.



Errors – How to Find and Fix

What can be corrected on an EPAF

- Changes can be made by the submitter only
 - These changes can only be made pre-submission **or** if the Departmental Approver sends the EPAF back to the Return/Correction queue
- Fillable fields in the EPAF **can be** corrected
- Effective date and EPAF category **cannot** be corrected

Errors – when saving

- **NOAEPAF**
- If you skip a required field, you will get an error when you try to submit.
- You can save, but when you submit you will get a pop-up.

Pending Change: Proxy For: ID: 951429400 Adrian Janelle Hartvigsen Transaction: 252630 Waiting Query Date: 05/30/2024 Last Paid Date: 09/30/2015 Approval Category: XAADD Student Additional Job Approval Type: XAADD

Position: BUOSRG UO Student Regular Suffix: 01

Transaction Default Earnings Job Labor Distribution Routing MIS E:J03 E-mail Additional Identification Other Information and Comments

Settings Insert Delete Copy Filter

Applied Status	Field Name	Current Value	New Value	Remove
P	Job Begin Date*	06/16/2015	07/01/2015	<input type="checkbox"/>
P	Accrue Leave*	Y	Y	<input type="checkbox"/>
P	Jobs Effective Date*	09/30/2015	05/30/2024	<input type="checkbox"/>
P	Appointment Percent*	49	49	<input type="checkbox"/>
P	FTE*	0.49	.49	<input type="checkbox"/>
P	Job Change Reason*	TERMJ	FIXAB	<input type="checkbox"/>
P	Step*		0	<input type="checkbox"/>
P	Regular Rate*		9.45	5 <input type="checkbox"/>
P	Hours per Pay*	84.93	84.93	<input type="checkbox"/>
P	Timesheet Orgn*	470000		<input type="checkbox"/>
P	Job Location*	20D	20D	<input type="checkbox"/>

ERROR Timesheet Orgn must be filled in for Approval Type: XAADD.

Errors – while submitting

- **NOAEPAF**
- When creating an EPAF, some errors will cause issues later
 - PAF Detail Information (NOAEPAF)

Electronic Personnel Action NOAEPAF 9.3.23 [UO.2] (TEST)

Pending Change: Proxy For: ID: 951429400 Adrian Janelle Hartvigsen Transaction: 252630 Waiting Query Date: 05/30/2024 **Last Paid Date: 09/30/2015** Approval Category: XAADD Student Additional Job Approval Type: XAADD Student Additional Job Start Over

Position: BUOSRG UO Student Regular Suffix: 01

Transaction	Default Earnings	Job Labor Distribution	Routing	MIS EJ03	E-mail	Additional Identification	Other Information and Comments	Settings	Insert	Delete	Copy	Filter
Applied Status	Field Name	Current Value	New Value	Remove								
P	Job Begin Date*	06/16/2015	07/01/2015	<input type="checkbox"/>								
P	Accrue Leave*	Y	Y	<input type="checkbox"/>								
P	Jobs Effective Date*	09/30/2015	05/30/2024	<input type="checkbox"/>								
P	Appointment Percent*	49	49	<input type="checkbox"/>								
P	FTE*	0.49	.49	<input type="checkbox"/>								
P	Job Change Reason*	TERMJ	FIXAB	<input type="checkbox"/>								
P	Step*		0	0 <input type="checkbox"/>								
P	Regular Rate*		9.45	5 <input type="checkbox"/>								
P	Hours per Pay*	84.93	84.93	<input type="checkbox"/>								
P	Timesheet Orgn*	470000	470000	<input type="checkbox"/>								
P	Job Location*	20D	20D	<input type="checkbox"/>								
P	Job Status*	T	A	<input type="checkbox"/>								
P	Contract Type*	S	S	<input type="checkbox"/>								
P	Workers Comp Code*		9101	<input type="checkbox"/>								
P	Supervisor ID			<input type="checkbox"/>								
P	Supervisor Position			<input type="checkbox"/>								
P	Supervisor Suffix			<input type="checkbox"/>								

* - indicates a required field.

20 Per Page Record 1 of 17

Errors – after submitting

- **NOIEMSG**
- This will show you the errors in an EPAF you have submitted has not yet been approved
 - Double-click on the error to go back into that field in NOAEPAF to fix

Proxy For: Transaction Number: 252630 ID: 951429400 Adrian Janelle Hartvigsen Originator: KBARTOW1 Category: XAADD Student Additional Job Errors: Warnings:

▼ ERRORS AND WARNINGS DETAIL FORM

Approval Type	Error Type	Errors and Warnings Information
XAADD	ERROR	*ERROR* Begin Date must equal the first Jobs Detail Effective Date.
XAADD	WARNING	*WARNING* Rate for this job is outside the Table/Grade range.
XAADD	ERROR	*ERROR* Begin Date must equal the first Jobs Detail Effective Date.
XAADD	WARNING	*WARNING* Total FTE for this employee exceeds one as of the eff date.

1 of 1 | 10 Per Page

My EPAF has
been returned
for correction.
Now what?

- Only the Originator can make changes. The Approver will add a comment as to what the problem is and return for correction.
- Go to NOAAPSM
- Transaction Status "Return/Correction"
- Queue Status "All"
- Select EPAF you want to correct
 - Select "Related"
 - Select PAF Detail to return to the NOAEPAF screen
 - Make corrections, save, and resubmit EPAF

The screenshot shows the 'Electronic Approval Summary Form NOAAPSM 9.3.5 (TEST)' interface. The top navigation bar includes 'ellucian' and icons for 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. The main form area contains several fields: 'User ID: CATHY1', 'Submitted From: [empty]', 'Submitted To Date: [empty]', 'Proxy For: [empty]', and 'Queue Status: * All'. The 'Transaction Status: *' dropdown menu is highlighted with a red circle and is set to 'Return/Correction'. A 'Go' button is located in the top right corner. At the bottom, a grey bar contains the text: 'Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.'

Fixing returned EPAFs straight from NOAAPSM

- Go to Related (to the right of Tools) and select NOAEPAF
- This will take you to the EPAF to correct and resubmit

Electronic Approval Summary NOAAPSM 9.3.17 (TEST)

User ID: KBARTOW1 Proxy For: Submitted From Date: Submitted To Date: Transaction Status: All Queue Status: All

Transaction Information Other Information and Comments **Errors**

TRANSACTIONS WITH ERRORS AND WARNINGS

ID	Name	Transaction No *	Approval Category *	Description
951429400	Adrian Janelle Hartvigsen	252630	XAADD	Student A

1 of 1 Per Page

ERRORS AND WARNINGS INFORMATION

Approval Type	Error Type	Errors and Warnings Information
XAADD	ERROR	*ERROR* Begin Date must equal the first Jobs Detail Effective Date.
XAADD	WARNING	*WARNING* Rate for this job is outside the Table/Grade range.
XAADD	ERROR	*ERROR* Begin Date must equal the first Jobs Detail Effective Date.
XAADD	WARNING	*WARNING* Total FTE for this employee exceeds one as of the eff date.

1 of 1 Per Page

ADD RETRIEVE RELATED TOOLS

Search

PAF Detail Information [NOAEPAF]

Errors – viewing in NOAAPSM

- When you're looking at EPAFs in NOAAPSM, there is an Errors tab
 - Click on it to see any errors

Electronic Approval Summary NOAAPSM 9.3.17 (TEST)

User ID: KBARTOW1 Proxy For: Submitted From Date: Submitted To Date: Transaction Status: All Queue Status: All

Transaction Information Other Information and Comments **Errors**

TRANSACTION INFORMATION

Active filters: ~~Name: Adrian% Approval Category: XAADD Apply: unchecked Transaction Number: 252630 Clear All~~

ID	Name	Approval Category	Description	Approver Action *	Apply	Queue Status
951429400	Adrian Janelle Hartvigsen	XAADD	Student Additional ...	None	<input type="checkbox"/>	

1 of 1 Per Page

Errors – viewing in NOAAPSM

- If there are errors, you can fix them while the EPAF is still in Waiting status
 - Go to Related (to the right of Tools) and select NOAEPAF
 - This will take you to the EPAF to correct and resubmit

The screenshot displays the 'Electronic Approval Summary NOAAPSM 9.3.17 (TEST)' interface. The top navigation bar includes 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. The 'RELATED' button is circled in red. Below the navigation bar, the 'Errors' tab is selected and circled in red. The main content area shows a table of transactions with errors and warnings. The first transaction is for 'Adrian Janelle Hartvigsen' with ID '951429400' and Transaction No '252630'. Below this, the 'ERRORS AND WARNINGS INFORMATION' section lists four entries:

Approval Type	Error Type	Errors and Warnings Information
XAADD	ERROR	*ERROR* Begin Date must equal the first Jobs Detail Effective Date.
XAADD	WARNING	*WARNING* Rate for this job is outside the Table/Grade range.
XAADD	ERROR	*ERROR* Begin Date must equal the first Jobs Detail Effective Date.
XAADD	WARNING	*WARNING* Total FTE for this employee exceeds one as of the eff date.

On the right side of the interface, a search bar is visible, and a link labeled 'PAF Detail Information [NOAEPAF]' is circled in red.

Viewing or Adding Comments

- Comments can be added to help people in the workflow understand the desired actions and outcomes
 - You can add comments for the approver
 - Instructions for correction can be added
 - Clarification as to why an EPAF was disapproved can be added

The screenshot displays the 'Electronic Approval Summary' interface for 'NOAAPSM 9.3.17 (PROD)'. The user is 'KBARTOW1'. The interface shows a table with columns for 'Submitted From Date', 'Submitted To Date', 'Transaction Status', and 'Queue Status'. A green checkmark notification at the top right indicates 'Saved successfully (1 rows saved)'. The 'Other Information and Comments' section is expanded, showing a table with columns for 'Date and Time', 'Made By', and 'Comments'. The 'Comments' field is highlighted with a green circle, and the 'Submitted From Date' field is also highlighted with a green circle. The 'Comments' field contains the text: 'You can add comments to an EPAF here. Once saved, anyone with access to view that EPAF can see the comments. If an EPAF is sent back to you for correction, the comments will indicate why and what to do next.'

Submitted From Date	Submitted To Date	Transaction Status	Queue Status
		All	All

Other Information and Comments

Created Date	Submitted Date	Application Date	Originator ID	Submitter ID	Applied to Database	By
02/20/2025			KBARTOW1			

COMMENTS

Date and Time	Made By	Comments
02/20/2025 13:26:48	KBARTOW1	You can add comments to an EPAF here. Once saved, anyone with access to view that EPAF can see the comments. If an EPAF is sent back to you for correction, the comments will indicate why and what to do next.

Record 1 of 1



Voiding and Deleting EPAFs

How to Void a Transaction

Transactions that have been submitted, but not approved can be voided

- Go to the Electronic Approval Summary Form (NOAAPSM)
- Set Transaction Status to “Pending” or “Waiting” and Queue Status to “All”.
- Move to Next Block by using **Alt+Page Down** on the keyboard or the Next Block button
- Under “Related (to the left of “Tools”), select NOAEPAF
 - This will take you to the EPAF transaction
- In the transaction tab, go to the **“Approver Action”** drop down menu on the bottom left
 - Select **“Void”**
 - Save

Voiding – cont'd

- NOAEPAF
- Approver Action Drop Down List (bottom left)
 - Void
 - Save

Electronic Personnel Action Form NOAEPAF 9.3.9 [UO.1] (TEST)

Pending Change: Proxy For: ID: [REDACTED] Transaction: 83317 Waiting Query Date: 01/11/2019 Last Paid Date: 10/31/2018 [Start Over](#)

Approval Category: SUPER Supervisor Update Approval Type: SUPER Supervisor Update [REDACTED] Suffix: 00

Transaction	Default Earnings	Job Labor Distribution	Routing	Other Information and Comments
TRANSACTION				
Applied Status	Field Name	Current Value	New Value	Remove
P	Jobs Effective Date*	01/01/2018	11/01/2018	<input type="checkbox"/>
P	Personnel Date*	01/01/2018	11/01/2018	<input type="checkbox"/>
P	Job Change Reason*	BREAP	HSUPU	<input type="checkbox"/>
P	Supervisor ID*	[REDACTED]	[REDACTED]	<input type="checkbox"/>
P	Supervisor Position*	B98438	B98438	<input type="checkbox"/>
P	Supervisor Suffix*	00	00	<input type="checkbox"/>

* - indicates a required field.

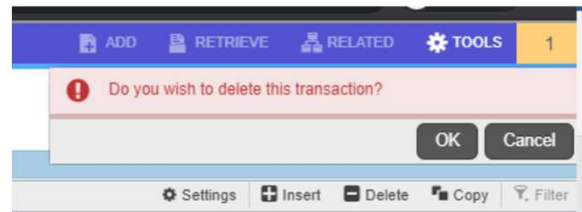
APPROVER


Approver Action: **Void** Queue Status: None(Originator)

How to Delete a Transaction

Transactions that have not been submitted can be deleted

- Go to the Electronic Approval Summary Form (NOAAPSM)
- Set Transaction Status to “Pending” or “Waiting” and Queue Status to “All”
- Find the transaction to be voided and select it from the list
- Select “**Tools**” from the menu, then “**Queue or Routing Information [NOAEPAF]**”
 - This will take you to the EPAF
- Select “**Tools**” from the menu, then “**Transaction**” to move to the transaction tab
- Select “**Tools**” from the menu, then “**Delete PAF**”
 - A pop up will ask you to confirm your request. Select “**OK**”





How to Approve an EPAF

Approving an EPAF (for dept. approvers)

- Go to the Electronic Approval Summary Form - **NOAAPSM**
- **Set Transaction Status and Queue Status to “Pending”**
- Move to Next Block by using **Ctrl+Page Down** on the keyboard or selecting “GO” in the upper right corner

X **ellucian** Electronic Approval Summary NOAAPSM 9.3.7 (PROD) ADD RETRIEVE RELATED TOOLS

User ID: KBARTOW1 Proxy For:

Submitted From: Submitted To Date:

Date

Transaction Status: * Pending Queue Status: * Pending

Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

Approving an EPAF (for dept. approvers) – cont'd

- Find the transaction you wish to review and select it from the list

The screenshot displays the Elucian Electronic Approval Summary interface. The top navigation bar includes the Elucian logo and the text "Electronic Approval Summary NOAAPSM 9.3.17 (PROD)". On the right side of the navigation bar are icons for "ADD", "RETRIEVE", "RELATED", and "TOOLS". Below the navigation bar, the user information is displayed: "User ID: KBARTOW1", "Proxy For:", "Submitted From Date:", "Submitted To Date:", "Transaction Status: Pending", and "Queue Status: Pending". A "Start Over" button is located on the far right. The main content area has three tabs: "Transaction Information" (selected), "Other Information and Comments", and "Errors". Below the tabs, there is a section titled "TRANSACTION INFORMATION" with a dropdown arrow and icons for "Settings", "Insert", "Delete", and "Copy". A table with the following columns is displayed: ID, Name, Approval Category, Description, Approver Action *, Apply, Queue Status, Required Action Indicator, and Transaction Number. The table contains one row with the following data: ID: 952086046, Name: Carina Ahrens, Approval Category: XBLABR, Description: GTF Labor Distribution, Approver Action *: None, Apply: , Queue Status: Pending, Required Action Indicator: Approve, Transaction Number: 31856. At the bottom of the table, there is a pagination control showing "1 of 1" and "10 Per Page".

ID	Name	Approval Category	Description	Approver Action *	Apply	Queue Status	Required Action Indicator	Transaction Number
952086046	Carina Ahrens	XBLABR	GTF Labor Distribution	None	<input type="checkbox"/>	Pending	Approve	31856

Approving an EPAF (for dept. approvers) – cont'd

- Select **“Related”** in the upper right corner, then **“PAF Detail Information [NOAEPAF]”**
 - This will take you to the EPAF transaction so you can review the proposed change.

The screenshot displays the 'Electronic Approval Summary' interface. At the top, there is a navigation bar with 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS' buttons. Below this, a search bar is visible, with a dropdown menu showing 'PAF Detail Information [NOAEPAF]' selected. The main content area features a table with the following data:

ID	Name	Approval Category	Description	Approver Action *	Apply	Queue Status	Required Action
952086046	Carina Ahrens	XBLABR	GTF Labor Distribu...	None	<input type="checkbox"/>	Pending	Approve

At the bottom of the table, there is a pagination control showing '1 of 1' and '10 Per Page'.

Approving an EPAF (for dept. approvers) – cont'd

- Review the information in the EPAF
- Click the “X” in the upper left corner to close NOAEPAF and go back into NOAEPAF
- If the information is correct, go to the “**Approver Action**” drop down menu and select “**Approve**”
 - Then **SAVE**

Electronic Approval Summary NOAAPSM 9.3.17 (PROD)

User ID: KBARTOW1 Proxy For: Submitted From Date: Submitted To Date: Transaction Status: Pending Queue Statu

Transaction Information Other Information and Comments Errors

TRANSACTION INFORMATION

ID	Name	Approval Category	Description	Approver Action *	Apply
952086046	Carina Ahrens	XBLABR	GTF Labor Distribu...	None	<input type="checkbox"/>

1 of 1 10 Per Page

None
Acknowledge
Approve
Disapprove
More Info
Return/Correction
Void

Approving an EPAF (for dept. approvers) – cont'd

- If the information is incorrect, go to the “**Other Information and Comments**” tab, and write a comment indicating what needs to be corrected.
 - **SAVE**
 - The submitter will be able to see your comments so they know what to do before resubmitting.

The screenshot displays the Allucian Electronic Approval Summary interface for a transaction with ID KBARTOW1. The transaction status is 'Pending'. The 'Other Information and Comments' tab is selected and highlighted with a red circle. The 'OTHER INFORMATION' section shows the following details:

Field	Value	Field	Value
Created Date	05/07/2026	Originator ID	
Submitted Date	05/07/2026	Submitter ID	
Application Date		Applied to Database	
		By	

The 'COMMENTS' section contains the following information:

Date and Time	05/07/2026 09:44:04
Made By	KBARTOW1
Comments	This is an example of a comment you could make - update the title to "Bouncer" and resubmit.

The interface includes a navigation bar at the bottom showing '1 of 1' pages and '1 Per Page'.

Approving an EPAF (for dept. approvers) – cont'd

- Once the comment is saved, go back to the “**Transaction Information**” tab
- Go to the “**Approver Action**” field and select “**Return/Correction**”
 - Then **SAVE**
- This sends the EPAF back to the submitter, who can then correct and resubmit

The screenshot shows the 'Electronic Approval Summary' interface for NOAAAPSM 9.3.17 (PROD). The 'Transaction Information' tab is selected. A table lists transactions with columns for ID, Name, Approval Category, Description, Approver Action, Apply, and Queue Status. The 'Approver Action' dropdown menu is open, showing options: None, Acknowledge, Approve, Disapprove, More Info, Return/Correction, and Void. The 'Return/Correction' option is highlighted with a blue circle. The 'Transaction Information' tab is also circled in blue.

ID	Name	Approval Category	Description	Approver Action	Apply	Queue Status
952086046	Carina Ahrens	XBLABR	GTF Labor Distribu...	None	<input type="checkbox"/>	Pending
952150062	Giorgia Cola	XBLABR	GTF Labor Distribu...	None	<input type="checkbox"/>	Pending

Approving an EPAF (for dept. approvers) – cont'd

- Do NOT forget to check the “**Errors**” tab before approving an EPAF
 - Warnings can be disregarded
 - Errors must be addressed or the EPAF will fail to apply, even if you approve it

Electronic Approval Summary NOAAPSM 9.3.17 (TEST)

User ID: KBARTOW1 Proxy For: Submitted From Date: Submitted To Date: Transaction Status: All Queue Status: All

Transaction Information Other Information and Comments **Errors**

TRANSACTIONS WITH ERRORS AND WARNINGS

ID	Name	Transaction No *	Approval Category *	Description
951429400	Adrian Janelle Hartvigsen	252630	XAADD	Student A

1 of 1 Per Page

ERRORS AND WARNINGS INFORMATION

Approval Type	Error Type	Errors and Warnings Information
XAADD	ERROR	*ERROR* Begin Date must equal the first Jobs Detail Effective Date.
XAADD	WARNING	*WARNING* Rate for this job is outside the Table/Grade range.
XAADD	ERROR	*ERROR* Begin Date must equal the first Jobs Detail Effective Date.
XAADD	WARNING	*WARNING* Total FTE for this employee exceeds one as of the eff date.

1 of 1 Per Page

Search PAF Detail Information [NOAEPAF]

Viewing or Adding Comments

- Comments can be added to help people in the workflow understand the desired actions and outcomes
 - You can add comments for the approver
 - Instructions for correction can be added
 - Clarification as to why an EPAF was disapproved can be added

The screenshot displays the 'Electronic Approval Summary' interface for 'NOAAPSM 9.3.17 (PROD)'. The user is 'KBARTOW1'. The interface shows a table with columns for 'Submitted From Date', 'Submitted To Date', 'Transaction Status', and 'Queue Status'. A green notification bar at the top right states 'Saved successfully (1 rows saved)'. Below the table, there are two main sections: 'OTHER INFORMATION' and 'COMMENTS'. The 'OTHER INFORMATION' section includes fields for 'Created Date', 'Submitted Date', 'Application Date', 'Originator ID', 'Submitter ID', and 'Applied to Database By'. The 'COMMENTS' section shows a comment made by 'KBARTOW1' on '02/20/2025 13:26:48'. The comment text reads: 'You can add comments to an EPAF here. Once saved, anyone with access to view that EPAF can see the comments. If an EPAF is sent back to you for correction, the comments will indicate why and what to do next.' The 'Comments' field is highlighted with a green circle. The 'Submitted From Date' field in the table above is also highlighted with a green circle. The interface includes navigation controls at the bottom, such as '1 of 1' and 'Per Page', and a 'Record 1 of 1' indicator.



Deadlines and Reminders

EPAF Submission Deadlines and Reminders

- To ensure your EPAFs apply at without issue or delay, be sure to submit by the deadline each month.
 - Once the time entry window opens, change EPAFs (LD, rate, supervisor) that have an effective date in the same month can no longer be approved and applied.
 - <https://ba.uoregon.edu/payroll/hris-deadlines>
- You will not get notified via email at any point during this process.
 - To look for an EPAF that was sent back for correction or is stuck in the waiting queue, you will need to regularly check NOAAPSM.
 - To check if an EPAF was applied successfully, check PWIVERI, PWIPAYR, etc.; checking in NOAAPSM alone will not confirm success.

Submitting Hire Documents (reminder)

- If hire documents are necessary for a student worker you are hiring via EPAF, you will also need to submit those documents to Payroll via our OneDrive
 - https://uoregon-my.sharepoint.com/:f:/g/personal/payroll_uoregon_edu/EvZ2ogthFaZNt9GaQZq2XogBU8_JFVcjNW8CgTotuGtD4A
- When sending in any documents to the Payroll OneDrive, please name the file as follows:
 - “Employee Name – Employee Type”
 - E.g., “Doerksen, Austin – OA”
 - This facilitates sorting so the docs go to the correct working folder, and expedites processing times
- Bundled packets and individual forms are available on our Forms page
 - <https://ba.uoregon.edu/payroll/payroll-administration/reports-and-forms>

Getting Access



For access to the necessary Banner forms

Contact Brian Strait at bstrait@uoregon.edu



To get routes set up beyond the basics

Contact Keri Bartow at kbartow1@uoregon.edu

You will need to include the name of your department approver



General EPAF inquiries and troubleshooting

payroll@uoregon.edu