HSC NSP EPAFS

- HSC NSP EPAF
- Required BAR Roles
- EPAF JobAids
Welcome to MyUNM!

MyUNM is your personal gateway to UNM. The myUNM portal provides tools to customize the portal to suit your individual needs by selecting which resources you wish to access.

What's Inside?

- **LoboWeb for Students:** Use LoboWeb for Registration, Grades, and more. To access LoboWeb for Students, log in to myUNM with your UNM NetID and LoboWeb logo to enter.

- **LoboWeb for Faculty & Advisors:** LoboWeb is the place for student information, enter grades, perform registration override, and more. To access LoboWeb for Faculty & Advisors, log in to myUNM with your UNM NetID and LoboWeb logo to enter.

- **E-mail:** The portal email is likely to be the preferred email application via a Web interface rather than be dependent on one computer check email from other provider accounts with it.

- **Calendar:** Campus community members – especially students, classes, and groups/organizations to track schedules, should continue to use those calendars to schedule University business.

- **Groups:** The Group Studio feature provides an easy-to-use Web applications include chat, where you can text chat online in real and exchange files. Any campus organization or department that an organization/department does not have its own NetID, you should contact the IT Computer Accounts office.

and much more...
Employee

Welcome to LoboWeb for Employees! You can view personal information such as benefits and deductions, leave balances and direct deposit information. You also have the ability to update the following:

- Demographic Self-Service Information (i.e. home address)
- Emergency Contacts
- Annuities and Donations
- W4 Forms
- Direct Deposit Information

Please remember that history will build beginning January 2, 2008. Information such as previous pay stubs or job history prior to January 2008 is not available.

Should you have any questions, be sure to call us at the Banner HR/Payroll Support Center at 277-HRPR (4777). Hours of operation will be Monday - Friday, 8am to 5pm.

**Personal Information**
- Update race/ethnicity information; update addresses, emergency contact information, and directory information; opt-out of public disclosure of home information.

**Make Bursar Payments**
- Pay Bursar billed insurance, parking tickets, etc. by credit card, checking or savings account.

**2014 United Way Campaign**
- Pledge Now!

**Electronic Personnel Action Forms**
- Labor Distributions and Employee Transactions

**Benefits and Deductions**
- Retirement, Health, Flexible Spending, Miscellaneous, Beneficiaries, Benefit Statement, VEBA Opt-Out Election

**Pay Information**
- Direct Deposit, Earnings History, Deductions History, Pay Stubs

**Tax Forms**
- W4 Form, W2 Statement
Electronic Personnel Action Form

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

RELEASE: 8.9

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Enter Banner ID# & use Tab key to auto fill the Faculty Member's name

Don't hit "Go" yet!
1) Delete the auto populated query date
2) Enter the first day of the month the NSP payment is to begin. For example: if the NSP should pay out (or begin paying out in the case of a monthly scheduled payment) in February enter 02/01/2015.
3) NSP’s are not back dated.
4) This is an important step that if not done correctly will unfortunately result in you having to cancel the EPAF and start over again.

Don’t hit “Go” yet!
APPROVAL CATEGORY – Select from the following:
1) Faculty NSP HSC Unrestricted, JF0020 – if using unrestricted index – Most of your NSP’s will be this category, OR
2) Faculty NSP HSC Restricted, JF0015 – use this one if a restricted index

Now Hit “GO”!
Select "All Jobs"
STOP! NEVER Select Primary – Suffix 00
Choose an “Overload” Job with a U suffix

1) Select U Suffix with a PAST “Last Paid Date” and Status “Terminated”
2) DO NOT USE IF IT HAS AN ACTIVE STATUS
1) 1st of the month the NSP will begin paying, i.e., 02/01/2015
2) NSP’s are not back dated
### Job End Date Example: One Time Payment

#### Job End Fields, FY0209-U1 Assistant Professor, Last Paid Date: Jul 31, 2014

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs Effective Date: MM/DD/YYYY*</td>
<td>07/31/2014</td>
<td>02/28/15</td>
</tr>
<tr>
<td>Job End Date: MM/DD/YYYY*</td>
<td>07/31/2014</td>
<td>02/28/15</td>
</tr>
<tr>
<td>Job Status: (Not Enterable)</td>
<td>Terminated</td>
<td>T</td>
</tr>
<tr>
<td>Job Change Reason: (Not Enterable) JBEND</td>
<td>JBEND</td>
<td>JBEND</td>
</tr>
</tbody>
</table>

*Last day of the Month the NSP stops paying*

*Auto Populated – (Not Enterable)*
Special Rate: One Time Payment Example

Enter Special Rate, FY0209-U1 Assistant Professor, Last Paid Date: Jul 31, 2014

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Earnings</th>
<th>Hours or Units Per Pay</th>
<th>Deemed Hours</th>
<th>Special Rate</th>
<th>Shift</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/01/15</td>
<td>202, Faculty Performance Pay</td>
<td>✓</td>
<td>1</td>
<td>5,000</td>
<td>1</td>
<td>03/01/15</td>
</tr>
<tr>
<td></td>
<td>Not Selected</td>
<td>✓</td>
<td>1</td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Not Selected</td>
<td>✓</td>
<td>1</td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Not Selected</td>
<td>✓</td>
<td>1</td>
<td></td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

1st of the month the NSP will begin paying
Earnings Code = 202 Faculty Performance Pay
Hours or Units Pay = 1
Special Rate = dollar amount to be paid out during one month
1st day of the month day after the Non-Standard Payment should stop paying
Job End Date Example - Monthly Scheduled Payment

Monthly Scheduled Payment Example:
1) Total amount to be paid out is $45,000
2) Payment start: 10/01/2014
3) Payment end: 6/30/2015
4) 9 months x $5,000 = $45,000

Job End Fields, FY0209-U1 Assistant Professor, Last Paid Date: Jul 31, 2014

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs Effective Date: MM/DD/YYYY*</td>
<td>07/31/2014</td>
<td>06/30/2015</td>
</tr>
<tr>
<td>Job End Date: MM/DD/YYYY*</td>
<td>07/31/2014</td>
<td>06/30/2015</td>
</tr>
<tr>
<td>Job Status: (Not Enterable)</td>
<td>Terminated</td>
<td></td>
</tr>
<tr>
<td>Job Change Reason: (Not Enterable)</td>
<td>JBEND</td>
<td></td>
</tr>
</tbody>
</table>

Auto Populated – (Not Enterable)

Last day of the Month the NSP should stop paying
Special Rate: Monthly Scheduled Payment Example:
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Enter Special Rate, FY0209-U1 Assistant Professor, Last Paid Date: Jul 31, 2014

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<th>Effective Date</th>
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<th>Deemed Hours</th>
<th>Special Rate</th>
<th>Shift</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/01/15</td>
<td>202, Faculty Performance Pay</td>
<td>✔</td>
<td>1</td>
<td>5,000</td>
<td>1</td>
<td>07/01/15</td>
</tr>
</tbody>
</table>

1st of the month the NSP will begin paying
Earnings Code = 202 Faculty Performance Pay
Hours or Units Pay = 1
Special Rate = dollar amount to be paid out during one month
1st day of the month day after the Non-Standard Payment should stop paying
The NSPs should have the corresponding description in the EPAF comments section.

<table>
<thead>
<tr>
<th>Account</th>
<th>Organization</th>
<th>Activity</th>
<th>Location</th>
<th>Project</th>
<th>Cost</th>
<th>Percent</th>
<th>Encumbrance Override End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005 - Faculty Incentive Pay</td>
<td>F222</td>
<td>GNACTV</td>
<td></td>
<td></td>
<td>100.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>200H - Faculty Call</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>200G - Faculty Extra Shifts</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Routing Queue: Faculty NSP HSC Unrestricted, JF0020

**Routing Queue**

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
<th>Required Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 - (DFA1) Dept Approv Level 1 - Faculty</td>
<td>Must be “Authorized Signature” for Index</td>
<td>Approved</td>
</tr>
<tr>
<td>40 - (CSO) College/School/Other Approver</td>
<td></td>
<td>Approved</td>
</tr>
<tr>
<td>60 - (EAFAC) Employment Area Faculty</td>
<td></td>
<td>Approved</td>
</tr>
<tr>
<td>93 - (FYPAY) FYT - Payroll at Approval</td>
<td></td>
<td>Apply</td>
</tr>
<tr>
<td>95 - (APPLY) Applier</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

SOM = Kristin Gates, COP = Marie Chestnut- HSC FCO
Stella Quintana - Payroll
Applier = Applier, Epaf (EAAPLIER)

Not Selected
Not Selected
Not Selected
Not Selected
Not Selected
Not Selected

Save and Add New Rows
## Routing Queue

### Faculty NSP HSC Restricted, JF0015

### Routing Queue

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
<th>Required Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 - (DFA1) Dept Apprv Level 1 - Faculty</td>
<td></td>
<td>Approve</td>
</tr>
<tr>
<td>40 - (CSO) College/School/Other Approver</td>
<td></td>
<td>Approve</td>
</tr>
<tr>
<td>50 - (HSCCG) HSC Contracts and Grants</td>
<td></td>
<td>Approve</td>
</tr>
<tr>
<td>60 - (EAFAC) Employment Area Faculty</td>
<td></td>
<td>Approve</td>
</tr>
<tr>
<td>93 - (FYPAY) FYI - Payroll at Approval</td>
<td></td>
<td>Approve</td>
</tr>
<tr>
<td>05 - (APPLY) Applier</td>
<td></td>
<td>Apply</td>
</tr>
</tbody>
</table>

- **Not Selected**
- **Not Selected**
- **Not Selected**
- **Not Selected**

**Must be “Authorized Signature” for Index**

- **SOM = Kristin Gates**
- **TBD**
- **Marie Chestnut – HSC FCO**
- **Stella Quintana - Payroll**
- **Applier = Applier, Epaf (EAAPPLIER)**

**Save and Add New Rows**
1. One Time Payment Comments Format Examples:

Per Department FIBCI Plan
One Time Payment
$5,000
OR
Per LOO of Offer dated 7/1/2014
One time Payment
$10,000

2. Monthly Scheduled Payment Comments Format Examples:

Per Department FIBCI Plan
Monthly Scheduled Payment to total $45,000 over 9 months
10/01/2014 – 6/30/2015
Monthly amount $5,000
9 months x $5,000 = $45,000
OR
Per Department FIBCI Plan
For Administrative Duties as Vice Chair of Internal Medicine
Monthly Scheduled Payment to total $20,000 over 9 months
10/01/2014 – 6/30/2015
Monthly amount $2,200
9 months x $2,200 = $20,000
3. Call and Shift Payment Comment Examples:

**Call**
Per Department FiBCI Plan
One Time Payment for 2 nights of call. 7/1/17 and 7/15/17 at $1,500 per night for a total payment of $3,000.

**Extra Shift**
Per Department FiBCI Plan
One Time Payment for 2 Extra Shifts. 8/1/17 and 8/20/17 at $2,000 per extra shift for a total payment of $4,000.
Select "Save"

Upload Back up Documents:
1) Faculty Member’s LOO or MOU (if applicable)
2) Other: for payments that are outside the FIBCI or FCP agreement for the current FY – document must indicate faculty members approval for payment
3) See UNM EPAF Attaching Documents Job Aid
## Access and Training

### EPAF Employment Transaction Roles

<table>
<thead>
<tr>
<th>Add</th>
<th>Training</th>
<th>Role Name</th>
<th>Role Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>You have it</td>
<td>Training complete</td>
<td>College/School/Other Approver</td>
<td>Department designated individual with the authority to approve at the College/School/ or other high approving authority level</td>
</tr>
<tr>
<td></td>
<td>Training complete</td>
<td>EPAF - Originator of Faculty Employment Transactions</td>
<td>Department designated individual with authority to originate a Faculty Employment Transaction EPAF.</td>
</tr>
<tr>
<td></td>
<td>Training complete</td>
<td>EPAF-Dept Apprv Level 1 - Faculty</td>
<td>Department designated individual with authority to approve a Faculty Employment Transaction EPAF-First Level approval.(Department needs an originator and a first level approval within the department to process a Faculty Employment Transaction EPAF.)</td>
</tr>
<tr>
<td></td>
<td>Training complete</td>
<td>EPAF-Dept Apprv Level 2 - Faculty</td>
<td>Department designated individual with authority to approve a Faculty Employment Transaction EPAF-Second Level approval.</td>
</tr>
</tbody>
</table>
Welcome!

The Electronic Personnel Action Form (EPAF) allows departments to process paperless personnel actions. EPAF’s are simple, concise, and allow data to default into the document without manual data entry. The forms enable the University to process personnel actions rapidly, through an electronic approval process, providing an audit trail for personnel actions.

**EPAF Advantages**
- An EPAF is never lost.
- Can always be tracked electronically.
- An EPAF is created online and applied to the Banner system electronically.
- Information is keyed only once, lessening the chance for data entry errors.
- Once the EPAF has been submitted, you can see who has approved it, disapproved it, made remarks about it or returned it for correction.

See Frequently Asked Questions about EPAF

Need Help? Try the Computer Based Training or a handy Job Aid

Can't find and answer? Contact an Employment Data Center (EDC)
Default Routing Queue

SET UP DEFAULT ROUTING QUEUES JOB AID

As a Department EPAF Originator, you can establish a pre-defined default routing queue for a particular approval category. The default routing will specify the mandatory levels of approval for that category, assign names to some or all the levels, and identify the action each of the approvers must take.

Search

Electronic Personnel Action Form

- EPAF Approver Summary
- EPAF Originator Summary
- New EPAF
- EPAF Proxy Records
- Act as a Proxy

Select EPAF Originator Summary
Default Routing Queue

EPAF Originator Summary

Select Default Routing Queue

EPAF Default Routing Queue

Select the type of action from the drop down menu.

Enter a NetID for each of the Approval Levels.

Required Action

- Approve
- Not Selected
- Approve
- FYI
- Apply

Revised 10/5/12
http://epaf.unm.edu/job-aids.php

- This setup will allow EPAF users to be notified when a transaction is awaiting “action” in myUNM
NSP’s EPAF Deadline remains the 3\textsuperscript{rd} of the month.

Except when there are extreme high volume months or holidays (which cause Payroll to run early)

Deadlines can be found [here](#)
Reminders/Tips

- New Account Codes available July 1st, 2017 for SOM (The NSPs should have the corresponding description in the EPAF comments section):
  - 200H Faculty Call
  - 200G Faculty Extra Shifts
  - 2005 (remains unchanged)

- 8/8ths UNM/VA faculty incentive pay continues to be processed on the old paper form. The department is responsible for obtaining Kristin Gates and HSC Finance approvals before bringing it to HSC FCO to complete processing it for payment. This process is the same for faculty who have recently terminated with UNM and are owed Incentive pay. The department should also submit a Payroll adjustment form with required signatures for terminated faculty.

- If you are processing a Regent Professorship or Lectureship Award be sure and use EARN CODE 210 (Prizes and Awards) and ACCOUNT CODE 2000.
Reminders/Tips

- When requesting a shell suffix:
  - Be sure and provide the Name, Banner ID and what month the payment is for.
  - Copy in all HSC FCO Staff Krickett Marquez, Veronica Iturralde, Tracy McReynolds and Marie Chestnut as we all cover for each other.

- Query Date must be the 1st of the payment month

- Include the phrase “Per Department FIBCI Plan” in your comments. This is required in addition to any other payment description.

- Include the payment/dollar amount in your comments.

- Use the correct current Position # for the faculty member – the easiest way is to look it up in the SOM OAA database. Or by Banner ID in the all Employee Report in HR Reports on LoboWeb.
• Use a unique “U” suffix (i.e. U1, U2, U3, etc.) for each individual incentive payment for that month.

• The Dept Level 1 Approver – MUST be the authorized “signature” on the index – HSC Finance is reviewing these in post audit and will be contacting department and individuals who are out of compliance with this policy.

• If you need to end a reoccurring or scheduled monthly payment contact HSC FCO via an email. You cannot do this via an EPAF.

• If using a restricted index be sure to use Faculty NSP HSC Restricted, JF0015.