

QUICK REFERENCE GUIDE

RECIPES FOR SUCCESS USING EPAF

For more detailed, step by step instruction see the [EPAF Tutorial](#)

How do I get to EPAF?

- Go to the MSU home page >MYINFO>Enter Secure Area>login>Employee Services>Electronic Personnel Action Form

How do I set my default routing queue?

- From the EPAF menu click EPAF Originator Summary then click Default Routing queue at the bottom of the page.

How do I know which users to put in my approval queue?

- Each college or department has slightly different routing procedures for forms. Please ask your supervisor or department head if you are unsure of your specific department's procedure.
- You are required to route all grant funded appointments to OSP and all Ag or Extension funded EPAFs to AES or ES. The dropdown menu in the routing queue has a list of the approval category levels which contain the approvers.
- Each EPAF has a mandatory routing queue for HR. Each department is assigned a HR customer service team. Go to www.montana.edu/hr to find your departments team members.

There are several date fields on EPAF what dates do I use?

Each *Recipe card* gives instruction or an explanation about what to enter in each field for a specified EPAF. The [Definition](#) section in this guide has general information about the dates.



DEFINITIONS

GID: General ID - Assigned by Banner to identify a unique person or entity instead of the Social Security Number.

AY: Academic Year (August - May)

FY: Fiscal Year (July- June)

POSITION: Number assigned to a specific department and/ or job type used to allocate a budget for jobs. A position number consists of a prefix followed by 4 digits. Certain job types have only one position number for each position other job types have "pooled positions". A position number exists independently of the person holding that position.

POOLED POSITION: Position that can have more than one individual attached to the same number. Each department has a unique 4-digit number preceded by a prefix. (Used for students, graduate assistants, temp hourly employees and adjunct faculty).

POSITION PREFIX: Identifies the campus and type of position: 1st digit identifies the campus.

4S#### - Bozeman Student position

4T#### - Bozeman Short Term position

JOB NUMBER: A position that has been assigned to an employee.

JOB SUFFIX: Further identifies the job. Most non-student jobs have a suffix of 00;

S1, S2...- Non Work-study Students

00, 01...- Work-Study Students

00, 01...- Short Term employees

The suffix is also used to create a unique active job for a student who may have two pay-rates within the same pooled position during the same pay period. Example 4S6635- S1 could be used for a rate of 8.00/hr and 4S6635-S2 for 8.50/hr.

LABOR DISTRIBUTION: Funding source for the salary on a job. Consists of COA =1 (chart of accounts) and Index and Account code which defaults to FOAPAL= Fund, Org, Account, Program, Activity, Location.

Students (non work-study)- use Acct 61225

Temp hourly – use Acct 61224

EPAF RECIPE: Quick reference for each EPAF category with specific instructions on data to be entered.

DATES

QUERY DATE: Determines which records you will find when searching EPAF. You will find all records with an effective date equal to or greater than the date entered. You can widen or narrow the results of a search with this date. With new EPAFS the query date will also default as the effective date on the job and labor distribution records.

EFFECTIVE DATE: This 'drives' the job record in BANNER. The effective date is the date the job record is recognized by Banner and the additions or changes begin. For tax purposes non work-study students become active the first day of the pay period and terminate the last day of the pay period.

Example: Student begins 8-15-07. Effective date entered as 08/15/2007 for active record and 05/31/2007 for terminated record or actual last day worked if known.

BEGIN DATE: For new hires and employees being assigned that job # for the first time, this is the same as the effective date. Once assigned to that employee the begin date doesn't change.

Example: Student is assigned job number 4S6635 -S1 effective 08/01/2005 and terminates 05/31/2006. The student is hired into the department AY2010. You would use the same job number, but the begin date does not change. The effective date changes to reflect the new record.