UTRGV EPAF System

Summer 2022 Edition

In conjunction with PeopleSoft

Use of EPAF, CPAF, Stipends, and Separations

The University of Texas Rio Grande Valley

UTRGV Human Resources
HR@utrgv.edu

Revised: May 25, 2022

Contents

Common Definitions

Approver: The approver is the person who reviews and approves the workflow in the form.

Assistant Dean: Is the approver from an academic school or college who reviews and approves a faculty or graduate assistant assignment.

Cost Center / Project Number: Is an assignment of the funding source.

CFS: Change of Funding Source Form. This form is used for updating the funding of an employee's current assignment.

CPAF: Change of Personnel Action Form, also referred to as Change of PAF and pronounced as "see-paf." It is used for proposing changes to a current employee's job data such as hiring dates, number of hours per week, position, rate of pay, department, location, or room number.

Creator: The person who creates the EPAF, CPAF, CFS, or Stipend.

Chartfield Manager: Is the person responsible for the cost center or project.

Employee Classifications: Is the classification of a position, also known as "empl class." See page 37 for the list.

EPAF: Electronic Personnel Action Form. This form is used for processing a candidate as a direct wage or resident position. A candidate is usually an individual who is new to the university or has not worked for the university for the last six months.

Hiring Official: Is the person in the department who reviews and approves a faculty or graduate assistant assignment.

HR: Office of Human Resources

Location/Supervisor: This form, also referred as CPOS, is used only for location and/or supervisor changes otherwise use a CPAF instead.

PeopleAdmin: Is the applicant tracking system used for hiring new employees for Faculty, Staff or Graduate Assistantship positions. PeopleAdmin can be accessed through the my.utrgv.edu portal.

Separation Form: This form is used to notify various departments including HR that an employee is leaving the university so that proper processes may take place.

Stipend: A stipend is used for processing an additional assignment for an employee outside their normal job duties for a specific amount of time. This only applies to exempt employees.

Workflow: This is an approval process initiated by the creator of the EPAF, CPAF, or Stipend and ending with the approval of the Office of Human Resources. The number of approvers required in a workflow depends on varied factors such as the employee classification. See the "Workflow Approver" chart for the full list of approvers.

Before you begin here are things to keep in mind.

1. **If you are hiring a *new* faculty, graduate assistantship, or full-time staff, do not proceed in this system. You must use the PeopleAdmin system.**
2. **How to request Position numbers.**

   The instructions to request and review the process for creating new positions are found on the Position Control website; www.utrgv.edu/planning-and-analysis/services-and-resources/position-control/. Position numbers are needed only when the department does **NOT** have a vacant position number that can be reused. The position numbers belong to a department; therefore, the department is rarely changed when processing PAFs.
3. **Discuss hiring or changes with the hiring and/or project manager beforehand.**

   Typically, any hiring or changes are expected to be discussed beforehand with the hiring official and/or cost center/project manager. Since this system does not allow attachments, if additional documentation is required by any of the participants in the workflow, please provide it to the respective approvers before creating the form. This will help expedite the workflow.

   If the approvers have any questions about a specific form, they will call the department before approving or rejecting it.
4. **Verify the manager of the cost center or project**

   The system will route approvals to the manager of the cost center or project to be used. If the information on file is incorrect or not found, a UTRGV Project Key Member Update form should be submitted to the Office of Financial Services/Comptroller before creating an EPAF or CPAF. As a reminder, if an employee is a Project Manager (Grants) please contact the Grants Accountant. If an employee is a Cost Center Manager, please submit a new UTRGV Cost Center Key Member Update via PeopleSoft with the name of the new employee responsible for the Cost Center number(s). Please note that updates to cost centers and projects in PeopleSoft might take a day or two to reflect in the EPAF system.
5. **Know the pay distribution, annual salary, and encumbrance**

   The creator of the EPAF or CPAF must know the annual salary (how much the employee would be paid from September through August) and the encumbrance amount (the amount being set aside to pay the employee throughout the fiscal year).

   For hourly positions such as direct wage, the system will calculate the amount of encumbrance and will allow a 10% margin between what was calculated and what was entered by the creator. The calculation is only for reference; the creator must enter an amount. No calculations are performed for salary positions.
6. **Prepare Documentation for International Employees**

   Verify if the prospective employee is on a VISA (and the type of VISA: F1, H1B, OPT, etc.) and/or if the employee is a non-resident. If hiring an international student, the student must complete the On-Campus Employment Eligibility Form. The On-Campus Employment Eligibility Form must be reviewed by the International Admissions Student Services office before any EPAF/CPAF approvals.

   For questions regarding hiring international student employees, contact the Office of International Admissions & Student Services at International@utrgv.edu

   For questions regarding the hiring process/requirements of international non-student employees, visit the UTRGV Immigration Services website at www.utrgv.edu/hr/operations/immigration-services/.
7. **Provide Criminal Background Check (CBC) link to the prospective employee**

   Departments are required to provide the CBC link to a secure online form to prospective employees. A unique CBC link will be provided by the department head to the individual who has been asked to complete a Criminal Background Check form.

   For *work-study and direct wage employees*, the CBC link is provided by the Student Employment Office.

For *faculty*, the assistant dean of each college will provide the link.

For the rest of the staff, the CBC link is provided by the recruitment area in Human Resources.

The CBC link can only be used for the same position. Do not use the same link for different classifications (for example, do not use the work-study code for a full-time position, or a clerk position for someone who needs to drive a university vehicle) as each Criminal Background link is related to the type of work the employee is to perform.

8. **Provide I-9 Form link to prospective the employee**

   This site, to be completed by the prospective employee, will take them through the process of filling in your I-9 in a few simple steps. The second step is for the prospective employee to show original documentation to the Office of Human Resources as instructed on the I-9 website. The process is not complete without this second step.

   Notify the employee that the I-9 form should be completed and presented to the Office of Human Resources. Human Resources will not process an EPAF until the I-9 form is submitted and the original document has been presented.

   Login site to the I-9 form for The University of Texas Rio Grande Valley can be accessed at https://secure.i9.talx.com/preauthenticated/LoginCAPTCHA.ascx?Employer=17817 and it is also available under the “Resources” > “Links” section of the EPAF system.

9. **If hiring a Direct Wage, Work-study, or SEI employee, make sure you have the Job ID corresponding to the job title being hired for.**

   The Job ID for a Direct Wage, Work-study, or Student Employee Initiative (SEI) job title is provided on the Handshake website found at is www.utrgv.edu/careercenter/handshake/

   Handshake, is a database where departments can review student resumes, contact students directly and post job openings for work-studies and direct wages.

   If your department does not have a Handshake username and password, it is recommended that you contact the Student Employment Office to register. Departments should not register directly from the site since it will treat the department as an external entity and have restrictions on certain features.

   Direct Wage information including salary ranges, job type, and duties such as a Tutor Academic Assistant; Student Assistant; Project Associate; or Part-Time Non-Student, can be found on the Handshake website under “Student Employment (On Campus) & Official Job Descriptions.”

Login

To access the EPAF System, visit the my.UTRGV.edu portal and once logged in, click on the EPAF icon found in the *Applications* section.

> If trying to access the EPAF System from an off-campus location, the myUTRGV portal will not display the EPAF icon. It will require you to first log into a VPN (Virtual Private Network) connection before proceeding. For more information on VPN connections, visit www.utrgv.edu/it/software/virtual-private-network/

> If after you have logged into the myUTRGV portal, and you still cannot access the system, your information may need to be updated in the EPAF system. To update your information, simply contact Human Resources to request access.

Home Screen

The top menu tabs include links to more options:

Home – This menu option directs you the EPAF dashboard containing a list of pending EPAFs, CPAFs, CPOSs, CFSs, or Stipends.

EPAF – This menu choice directs you to the form for creating an EPAF. This form is used when hiring a candidate as a student employee (direct wage or resident position) who is new to the university or has not worked for the university for the last six months. For full-time and graduate assistantship type positions, use the PeopleAdmin system instead.

CPAF – This menu selection directs you to the form for creating a CPAF. This form is used for recommending changes to a current employee's job data such as funding source, hiring dates, number of hours per week, position, rate of pay, and change in department.

Stipend – This menu choice directs you to the stipend form. This form is used for processing an additional assignment for an employee outside their normal job duties for a specific amount of time. *This only applies to exempt employees*.

Location/Supervisor – Also referred to as CPOS, this form is used only when the employee's position needs a change in the location and/or supervisor information. Otherwise, a CPAF should be used.

CFS – The Change of Funding Source form is used for updating the funding of an employee's current assignment.

Employee Separation – This form is used only when an employee is leaving the university for more than three months.

Reports: Reports is a search feature used for viewing EPAFs, CPAFs, Stipends and CPOS based on specific criteria.

Resources – This menu choice directs you to useful links such as manuals, reports, and other links.

Portals – Access to other HR portals such as Tuition Assistance and the previous EPAF System for Oracle.

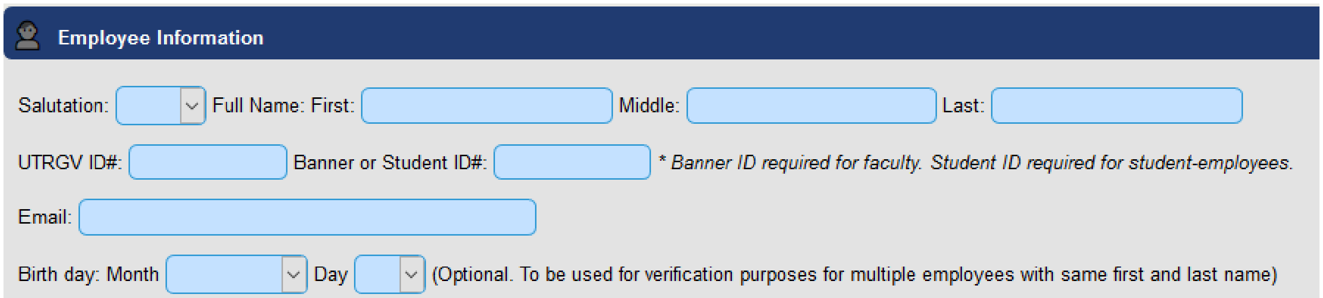
EPAF

The EPAF form is used when hiring a direct wage or resident position. It is for an individual who has not worked for the university before or has not been employed by UTRGV for more than six consecutive months. If your department is hiring an existing UTRGV employee, please process the request using the CPAF form instead.

Note: When hiring a new faculty or full-time staff positions, the *PeopleAdmin system* should be used. For faculty, contact your Assistant Dean for assistance.

Employee Information

To begin the EPAF, provide the basic information of the person to be hired.



Select the type of salutation (Dr., Miss, Mr., Ms., Mrs.)

Provide the required information, including the employee's name, student/banner ID (if student or faculty), and an email address.

The **month** and **day of birth** are required for STU and WS classifications but is optional for all other classifications. This is used for verification purposes where there might be multiple employees with the same first and last name.

ⓘ Why is the email address required?

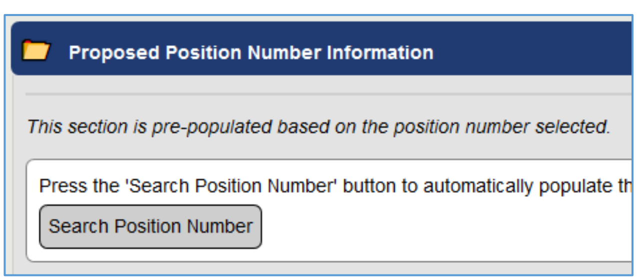
If processing a new employee, this person will not have a UTRGV email address. In this case, provide their personal email. This is required by departments to contact the prospective employee in case they have any questions during the hiring process. It is also used for sending the UTRGV credentials once their profile has been created in PeopleSoft. If the employee is a student, they will have a UTRGV email address along with a Banner ID.

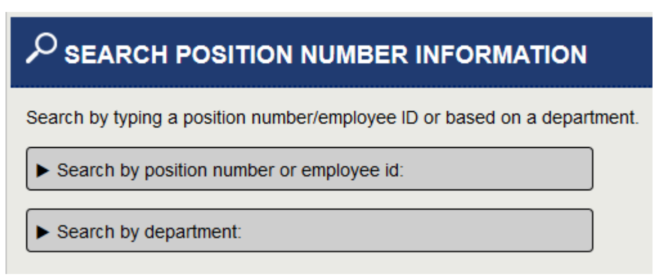
Proposed Position Number Information

Position numbers are an essential part of the EPAF System as this is required in PeopleSoft. Unlike previous systems, the position number must first be created and exist in PeopleSoft before it can be assigned to an employee.

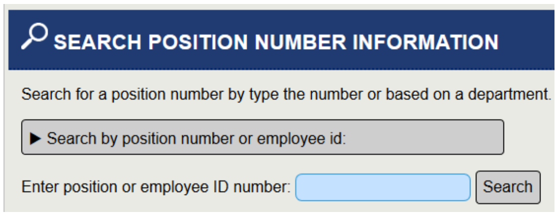
Search for the position number that the employee will be placed into by clicking on the "Search Position Number" button.

A pop-up screen will appear with the options to search by position number or department.

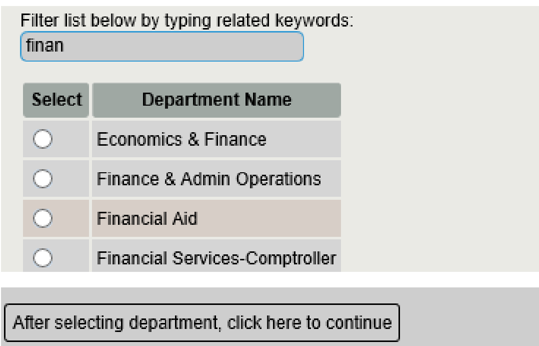




If you already know the position number, select "Search by position number" and type the number in the corresponding field and click the "Search" button

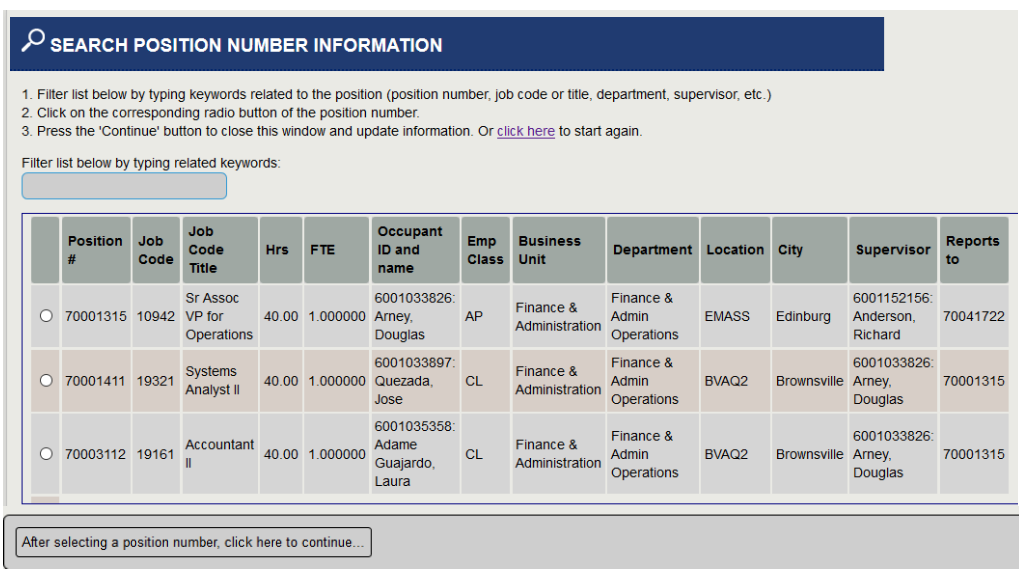


If you do not know the position number, you may search for the position based on the department. Under "Search by department" there will be a list of all the departments available. You may filter the list by typing the department name. Select the department by clicking on the corresponding radio button and pressing the continue button.



Once you search either by position number or department, a list of all positions about that position or deparment will be displayed. If the list is too long, you may filter it by typing the keywords pertaining to the position you want to use.

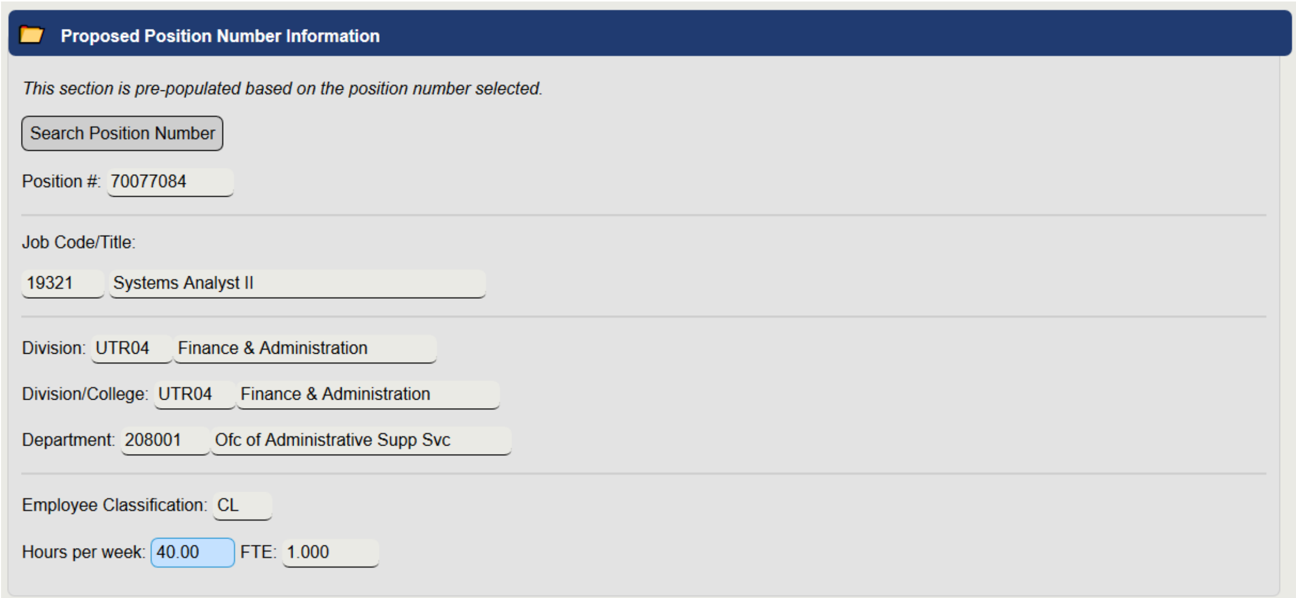
The position number contains the job code, job title, hours, FTE, occupant (if currently filled), employee classification, business unit (division), department, location (building), city, supervisor, and reports to (position number of supervisor).



	Position #	Job Code	Job Code Title	Hrs	FTE	Occupant ID and name	Emp Class	Business Unit	Department	Location	City	Supervisor	Reports to
○	70001315	10942	Sr Assoc VP for Operations	40.00	1.000000	6001033826: Arney, Douglas	AP	Finance & Administration	Finance & Admin Operations	EMASS	Edinburg	6001152156: Anderson, Richard	70041722
○	70001411	19321	Systems Analyst II	40.00	1.000000	6001033897: Quezada, Jose	CL	Finance & Administration	Finance & Admin Operations	BVAQ2	Brownsville	6001033826: Arney, Douglas	70001315
○	70003112	19161	Accountant II	40.00	1.000000	6001035358: Adame Guajardo, Laura	CL	Finance & Administration	Finance & Admin Operations	BVAQ2	Brownsville	6001033826: Arney, Douglas	70001315

Note: Before selecting a position, if the list of positions was displayed based on a filter by department, review the details of that specific position to make sure that everything pertaining to it is correct, especially the FTE and supervisor.

Once you select the position number and continue, the pop-up box will close and the Position Number Information box and supervisor information will be prepopulated in the EPAF. Note that this information cannot be modified.


Proposed Position Number Information

This section is pre-populated based on the position number selected.

Search Position Number

Position #: 70077084

Job Code/Title:

19321 Systems Analyst II

Division: UTR04 Finance & Administration

Division/College: UTR04 Finance & Administration

Department: 208001 Ofc of Administrative Supp Svc

Employee Classification: CL

Hours per week: 40.00 FTE: 1.000

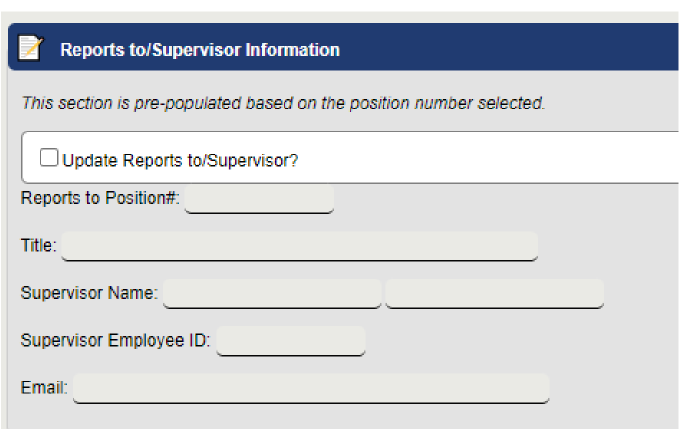
FTE (Full-Time Equivalent)

The FTE is calculated based on the number of hours per week, where the maximum number of hours is 40, or an FTE of 1.00.

> *Note*: Positions have an FTE tied to it. If you need to hire two employees with the same title and department but with a different FTE, make sure you select the position number with the corresponding FTE. If no position exists with the FTE you would like to use, visit the Position Control website (www.utrgv.edu/planning-and-analysis/services-and-resources/position-control) for instructions on how to request a new position number.

Reports to

In PeopleSoft, the position is linked to the position number of the supervisor and not to the employee ID of that supervisor. If the Reports to Position is filled, the name and employee ID of the supervisor will be shown. This field is important since timecards are approved by the person in the *Reports To* position. Make sure that the position you are selecting contains a *Reports To* number and that it is the correct one. If not, you will need to update it. Keep in mind that changes to the Reports to will affect all other part-time employees who might be sharing the same position number.


Reports to/Supervisor Information

This section is pre-populated based on the position number selected.

Update Reports to/Supervisor?

Reports to Position#:

Title:

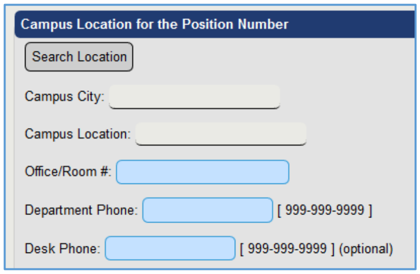
Supervisor Name:

Supervisor Employee ID:

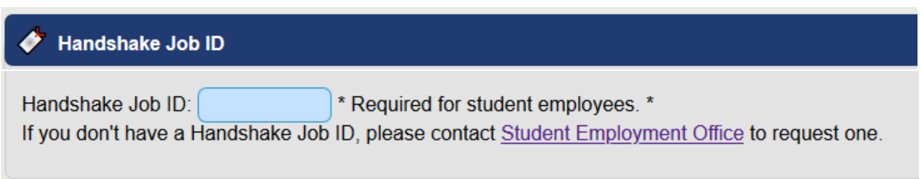
Email:

Campus Location for Position Number

The Campus City, Location and Office/Room # fields will be auto populated based on the position number. You may update this information if needed by selecting the Search Location button.



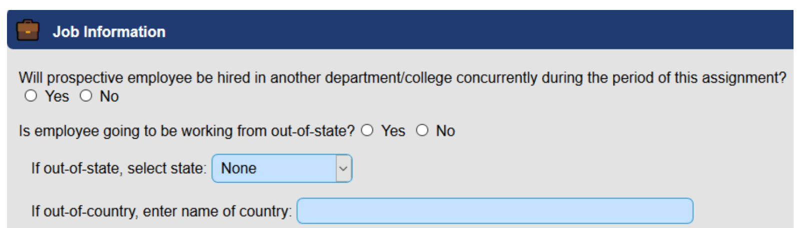
Handshake



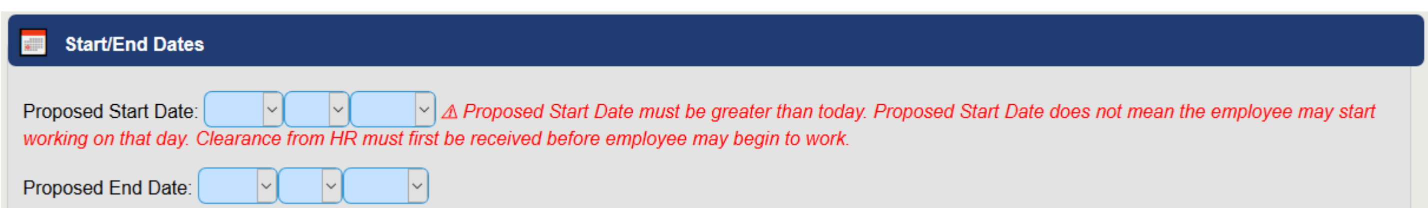
If hiring a student employee, the Handshake Job ID provided to departments is required to process the EPAF. Handshake is the online career management system for UTRGV students. If you have any questions or need further assistance regarding Handshake, contact the Student Employment Office at (956) 665-2243, (956) 882-5627 or email at Handshake@utrgv.edu.

Job Related Information

If the person you are hiring is concurrently working in another department during the period of this assignment, make sure to respond with "Yes" to first question. This is needed to make sure the employee does not go over the maximum number of hours allowed.



For the second question, indicate if the employee will be working from out-of-state or out-of-country.



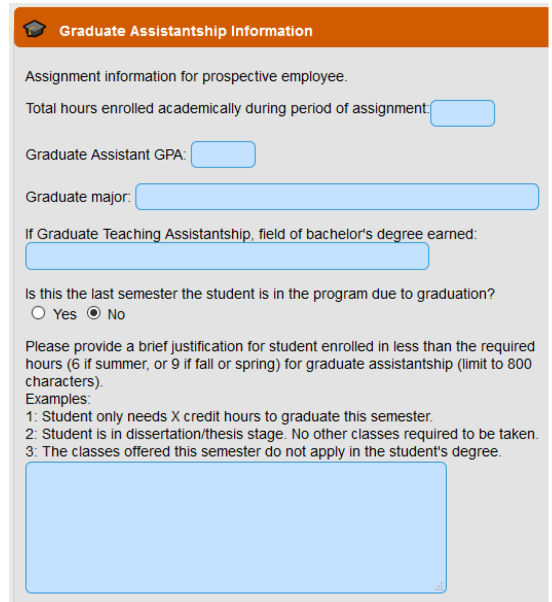
Proposed Start Date - Enter the date that the employee is expected to work. The Proposed Start Date must be greater than the current date when the EPAF is being created, ideally two weeks in advance.

Note: Faculty working in the fall semester should have a starting date of September 1 even if their first day falls in August.

> **Proposed Start Date vs HR Hiring Date**
> The Proposed starting date entered by the department **may sometimes not** be the date the employee can start working. Clearance from HR must first be received before the employee may begin to work.

Proposed End Date - The EPAF system has been modified so that there is no limitation on the end date for grant-funded employees. The end date for these types of assignments can be past the end date of the current Fiscal Year. End dates in the EPAF system must match what the grant and project have approved.

Graduate Assistantship Information



When selecting a graduate assistantship position, additional questions will be asked regarding the graduate assistant.

Enter the total hours enrolled academically during the period of assignment for the proposed employee.

Provide the Graduate Assistantship's GPA.

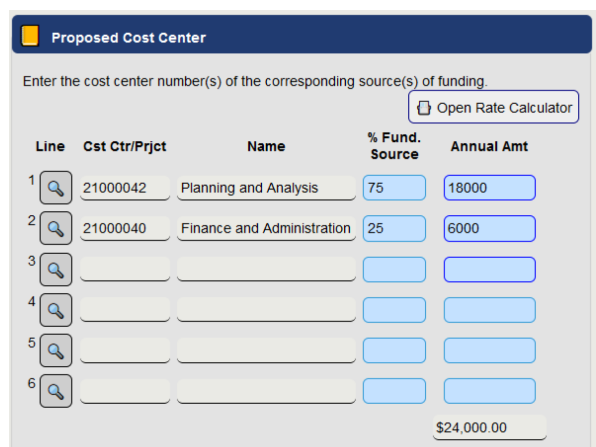
Graduate's major degree/program.

If Graduate Teaching Assistantship, provide the field of bachelor's degree earned.

If enrolled in less than the required hours for assistantship and is not the last semester the student is in the program, provide a brief description. Examples for justification include:

- The student only needs X credit hours to graduate this semester.
- The student is in dissertation/thesis stage. No other classes are required to be taken.
- The classes offered during the semester period of assignment do not apply to the student's degree.

Proposed Cost Center



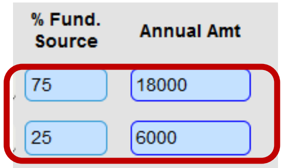
The Proposed Cost Center(s)/ Project(s), percent of funding and annual rate fields will be pre-populated from the position number. If an update to funding is needed, click on the "Search" button to open the pop-up box that will list all PeopleSoft cost centers and/or projects. Change the Annual Rate and Proposed Encumbrance as needed. The percentage of funding must add up to 100%.

Annual Amount

This annual amount is what the employee would be paid for the full fiscal year (from September to August) as an FTE of 1.00 or contract period. The annual amount (distributed if using more than one project) is entered here even if the employee is expected to work for less than the contract period.

For example, if hiring a full-time staff with an FTE of 1.00 for the whole fiscal year and the Annual Amt is $24,000, that amount is entered even if the employee were to start later in the year, or if the FTE was less than 1.00.

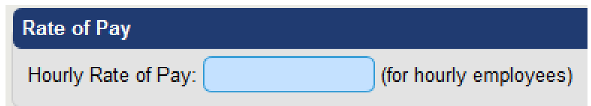
If using more than one funding source all lines added together must add up to the Total Annual Rate.
Example: For an employee working for 10 months for an annual amount of $24,000, if using two projects, one with a *Funding Source* of 75% and another with 85%, the annual amounts would be $18,000 and $6,000, respectively.



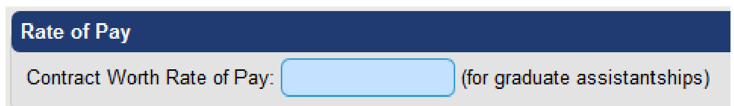
Rate of Pay

The rate of pay will depend on the type of part-time staff position. For student-employees and part-time non-students, enter the Hourly Rate of Pay; for Graduate Assistantships, enter the Contract Worth Rate of Pay; and for AmeriCorps, enter the Annual Amount. This section is not needed for faculty and full-time staff.

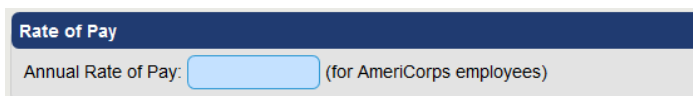
Student Employees and Part-Time Non-Students:



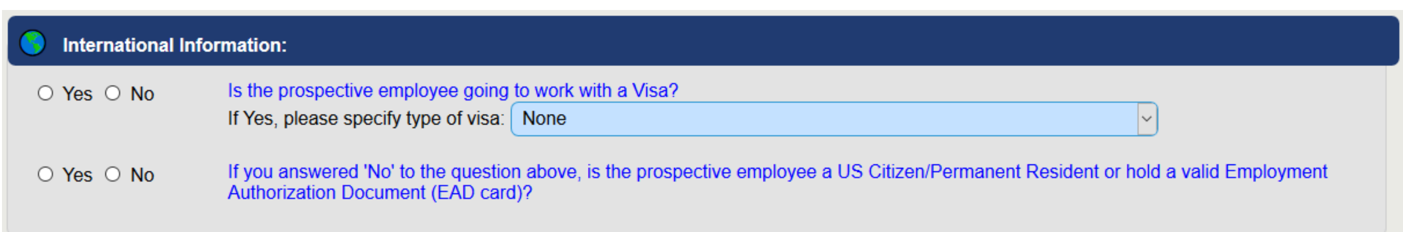
Graduate Assistantship:



AmeriCorps:



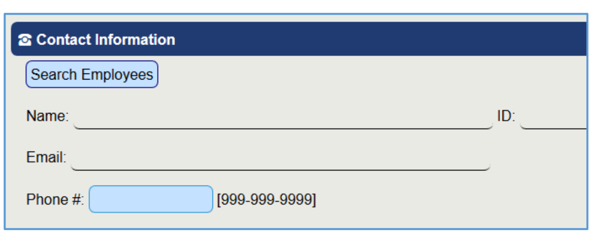
International Information



Select if the prospective employee is International and if so, provide the type of Visa.

Contact Information

Provide the contact information in case any of the departments in the workflow have any questions. Include the area code and prefix (882 or 665) with the phone number.



Workflow Information

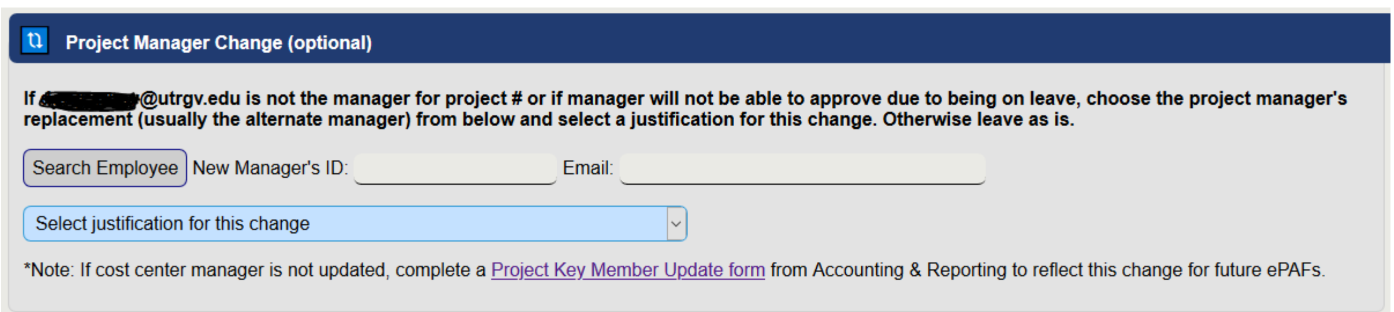
Once you continue, the system will check for any missing information. If all the information is correct, it will generate a workflow list after the Contact Information section based on the information provided. See the Workflow section on page 40.

Workflow for ePAF

Title/Department	Email	Status
Creator/Originator	John.Doe@utrgv.edu	Submitted on at
Manager 1	Jim.Lee@utrgv.edu	Pending
Position Control	PositionControl@utrgv.edu	Pending
Human Resources	hr@utrgv.edu	Pending

Project Manager Change (optional)

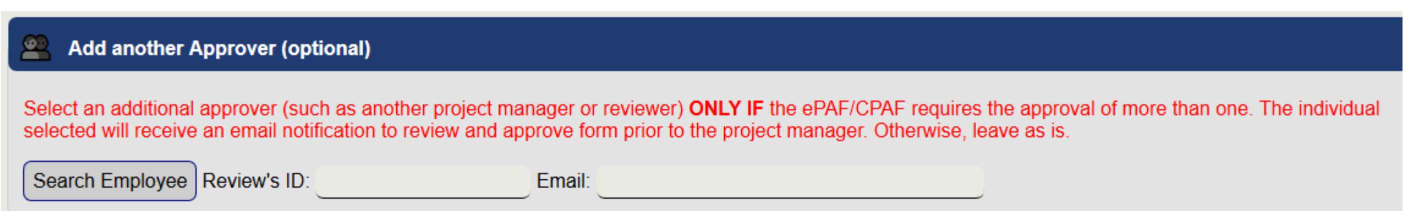
There will be cases where the manager of the cost center or project is not available and someone else needs to approve on their behalf. The EPAF system allows you to change the manager for that EPAF by clicking on "Search Employee" button and searching for the manager and providing the justification.



If the cost center manager is not updated, you might need to complete a Project Key Member Update form from Accounting & Reporting to reflect this change for future EPAFs.

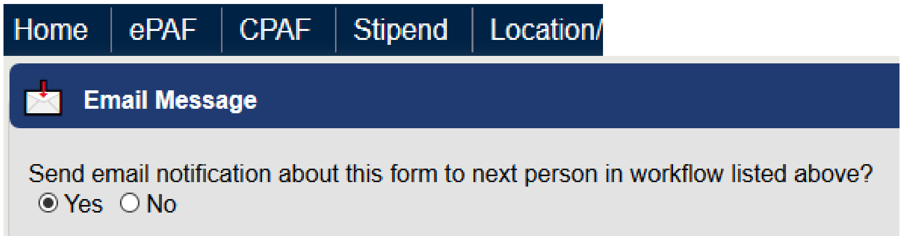
Additional Approver

Sometimes a department may want someone to review and approve the EPAF before it goes to the cost center manager. The creators have the option to do so by selecting the employee from the "Add another Approver" section.



Email messages

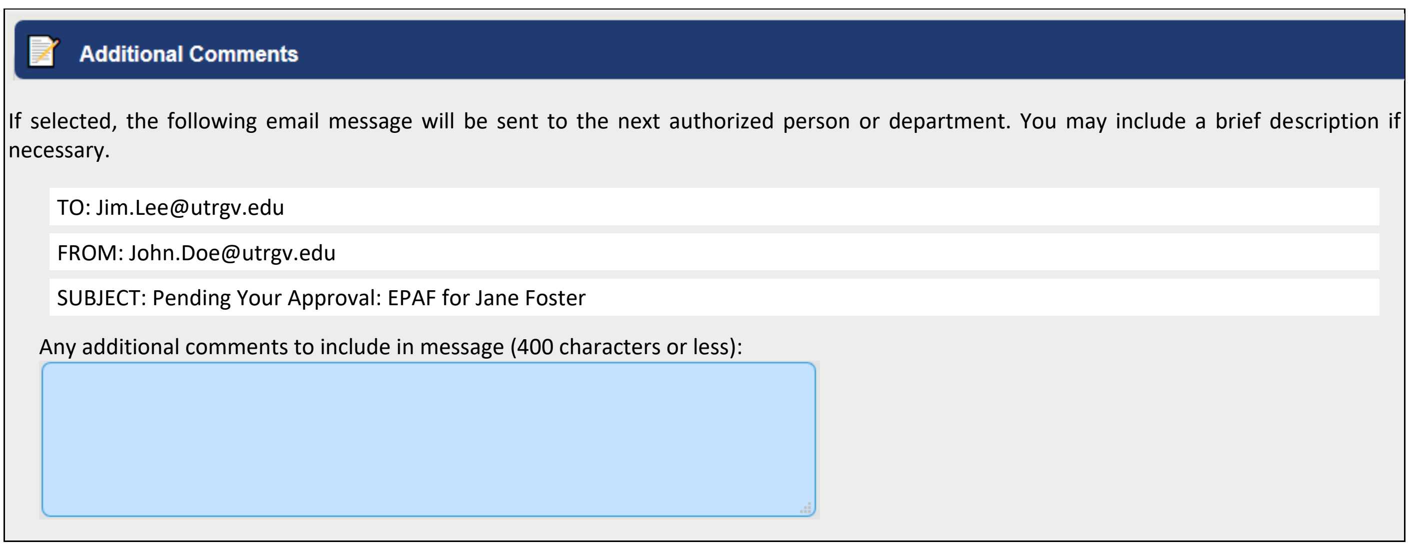
By default, email notifications are sent to those next in the workflow so that they may be aware that an EPAF is pending their approval, but there is an option to not send an email for those cases a department is creating consecutive EPAFs for various employees to be hired and where the email notifications would be overwhelming.



Note: Certain departments such as Position Control and Human Resources have opted to have the default set to "No." There is no need to notify them via email that an EPAF is pending since they are looking at their pending items in the EPAF system throughout the day.

Additional Comments

Provide a brief comment regarding the purpose of the EPAF. This is optional. Note: Even if you select not to send out an email, any comments entered here will be saved in the EPAF so that any person who can view the EPAF may read them.



Click on "Continue" to submit the EPAF.

A confirmation page will be displayed.

Approving an EPAF

Once an EPAF has been submitted, it is sent to the next person in the workflow. The EPAF can either be approved or rejected by the recipient. The recipient has two methods to access the EPAF, they can log into the EPAF system via the link provided in the email notification or via the my.utrgv.edu portal. Once logged in, click on the "Home" link from the menu ribbon.

A list of results for pending items will be displayed. Click on the corresponding “View” button for content.

Form	View	Emp ID	Emp Name	Position#	Chartfield1	Location	Emp Class	Job Code/ Title	Hand-shake ID	Department	Proposed Start Date	End Date	Status	Created
EPAF 1009009	View		Foster, Jane	70101257	21000042, 21000040	BVAQ2	STU	10059: Student Assitant	6650193	Campus Facilities Operations	05/10/2020	05/31/2020	Pending Manager	04/30/2020 10:05 a.m.

Once you view the content, you can select to approve or reject the EPAF.

✓ Routing Approval

The information above has been: ◉ **Approved** ○ **Rejected**

When should an approver reject an EPAF?
There might be cases where an EPAF does not have the correct information, such as a misspelled employee name or the wrong number of hours. An approver has the choice to either edit the EPAF (explained on page 25) or have the creator or someone else in the workflow do the update. Once fixed, they can come back to the EPAF, review it again and approve it. It is recommended to only reject if the EPAF requires too many edits or if the EPAF is no longer valid (such as when the employee is not going to be hired after all).

The approver may select to send an email notification to the next person in the workflow. Keep in mind that some departments have opted not to receive emails, in this case by default, the email notification is set to “No” since there is no need to be notified.

Email Message

Send email notification about this form to next person in workflow listed above?
○ Yes ◉ No

The approver may provide additional comments. Even if no email notifications are going to be sent, the comments will be recorded in the EPAF so that other approvers may read them.

Additional Comments

If selected, the following email message will be sent to the next authorized person or department. You may include a brief description if necessary.

TO: PositionControl@utrgv.edu

FROM: Jim.Lee@utrgv.edu

SUBJECT: Pending Your Approval: EPAF #1009009 for Jane Foster

Any additional comments to include in message (400 characters or less):

Click on the “Continue” button to update the form based on your approval selection.

Note: If rejecting an EPAF, anyone who has already approved it, including the creator, will be notified via email that it has been rejected. It is recommended that you provide a brief description explaining why it was rejected.

Change of Personnel Action Form (CPAF)

A Change of Personnel Action Form (CPAF) is required when there is a change in an employee's:

- Funding source (cost center, grant, encumbrance, etc.)
- Hiring date
- Ending date (If end date is due to a separation from the university, use the Separation Form instead).
- Number of hours per week
- Position Number
- Job Title
- Rate of pay
- Division/Department (moving to another division or department)
- Reports To
- Location (city, building and office number)
- Any other correction to an earlier EPAF or CPAF already approved by Human Resources.

When NOT to submit a CPAF

- If the only change in the employee information is their name (last name from single to married, for example), no CPAF is required. The ***employee*** should submit a request in PeopleSoft through the employee self service.
- If the only change is the supervisor and/or location (building or office), then submit a "Location/Supervisor" form instead. This is a shorter version of the CPAF that does not require additional information such as cost center numbers and workflow approval.
- If an employee (full-time, part-time, faculty, staff, work-study, etc.) is separating from the university, a CPAF is not required. A Separation form should be submitted instead (see "Separation Form" section for information).

Search Employee to Update

On the first page of the CPAF, enter the **employee id** (recommended), position #, or name of the employee needing update.

SEARCH EMPLOYEE TO UPDATE CPAF

Enter employee ID:

Continue ===>

NOTE: Employees cannot submit their own CPAFs. A supervisor or another employee will need to submit on their behalf.

From the results, select the information you want to make changes to.

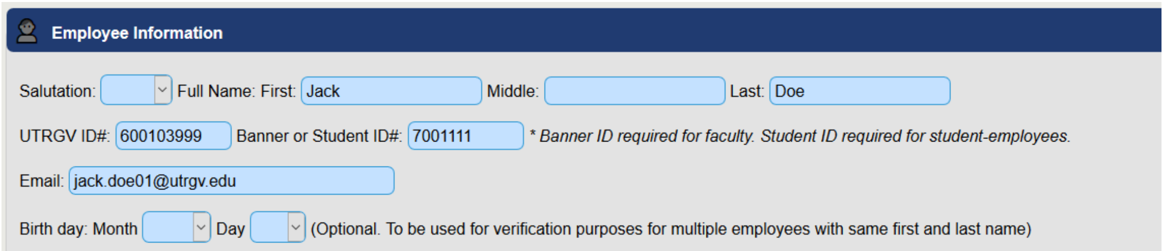
CPAF SEARCH RESULTS: STEP 2 OF 5

Results are based on keyword '6001148212'. To search again, click here.

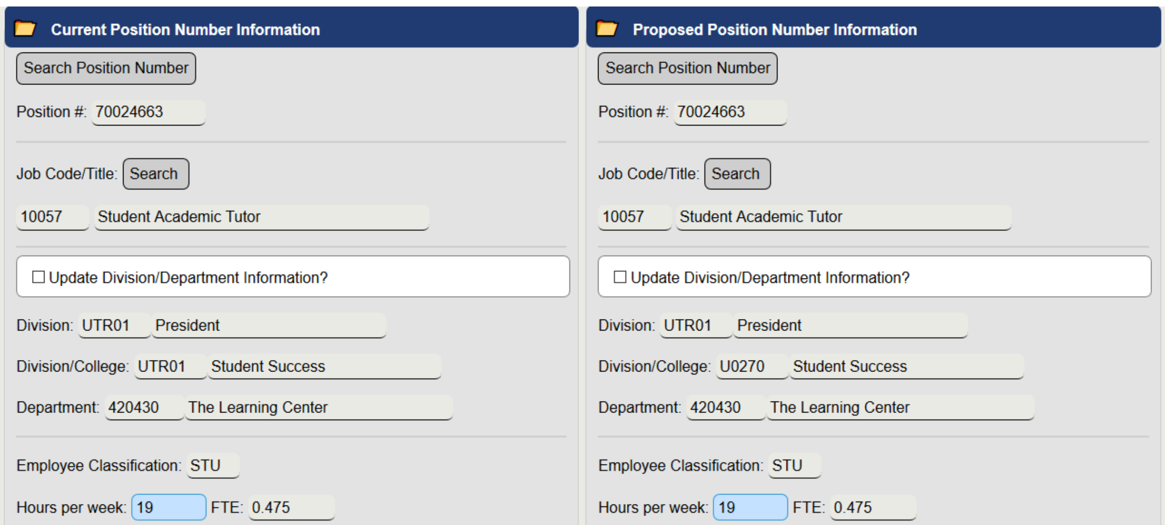
○ Blank CPAF.

	#	Job Title	Employee Name	Emp ID	Department	Created
○	CPAF3091012	10057: Student Academic Tutor	Doe, Jack	6001039999	The Learning Center	
○	POS #70024663	10057: Student Academic Tutor	Doe, Jack	6001039999	The Learning Center	N/A
○	POS #70013662	10057: Student Academic Tutor	Doe, Jack	6001039999	The Learning Center	N/A

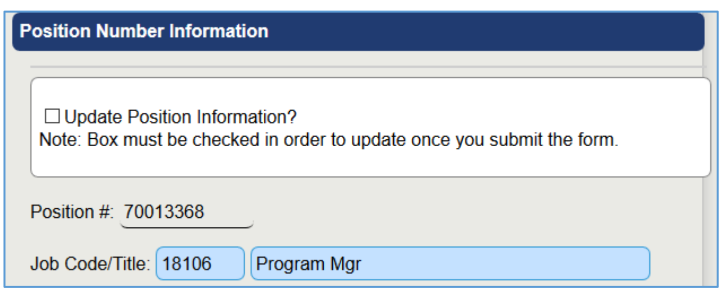
On the next page, most of the fields will automatically be prepopulated based on the position selected.



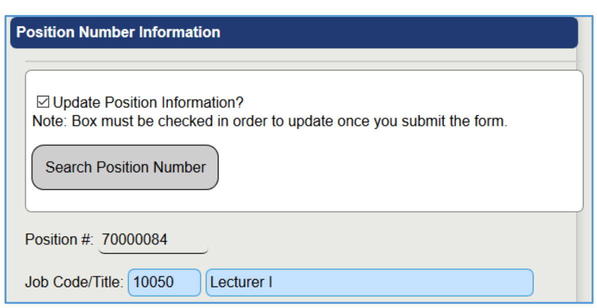
The current information will be in the left column and the proposed information will be in the right column. Data in the proposed column needs to be updated as needed.



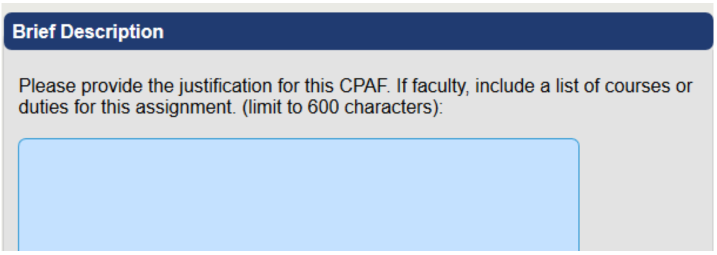
To update the proposed, click on the corresponding checkbox in the section you need to make changes to. This will display additional options for updating the information.



For example, clicking on the Update Position Information checkbox will allow you to view the "Search Position Number" button. Note that when selecting a new position not only will the job code be updated, but also anything else, related to the position such as the reports to, location, city, and cost centers.



When creating a CPAF, a brief description/justification for the change is needed. For a list of examples of what to include in the description box, see the "Brief Description Examples" section found at end of this manual.

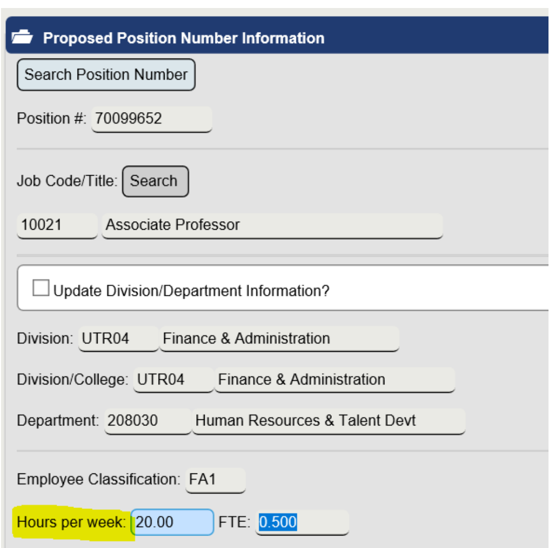


Update other fields as needed. Instructions for other fields are the same as found on Pages 11 -12.

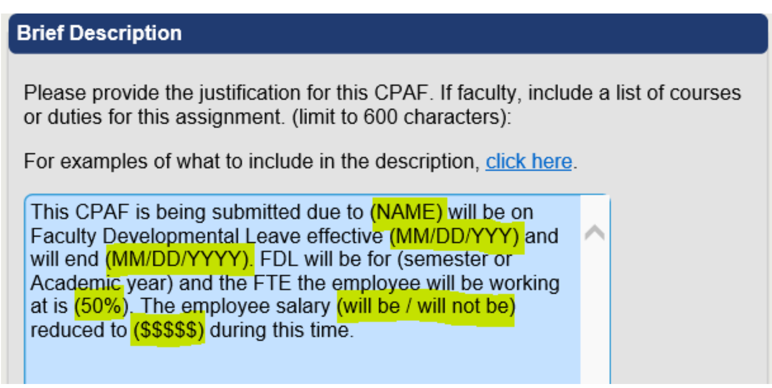
Faculty Development Leave (FDL)

When preparing a CPAF for a Faculty Development Leave, please follow the recommended steps below.

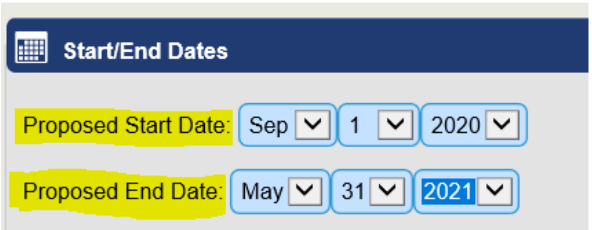
Under the "Proposed Position Number Information" section, update the hours per week as per the approved Faculty Developmental Leave so that Position Control may update the FTE accordingly in PeopleSoft.



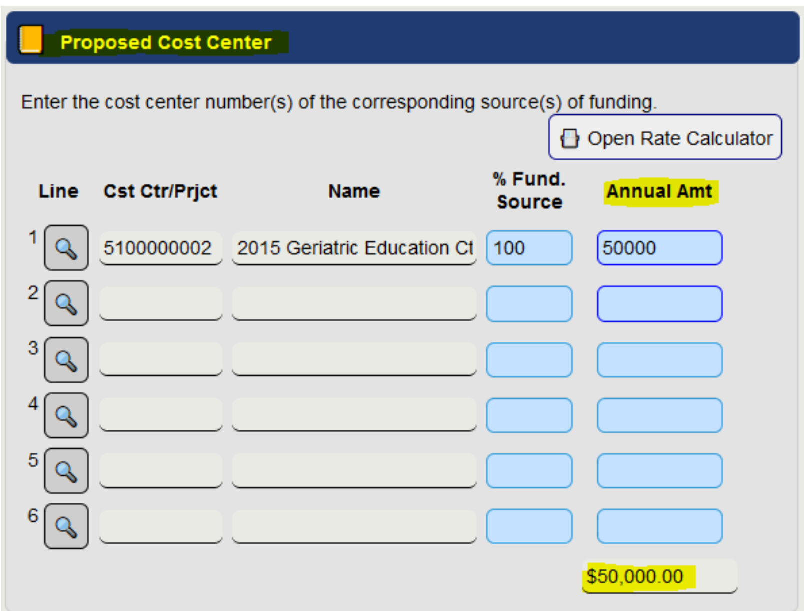
The Brief Description information section is especially important for Human Resources, this is needed so that we understand what needs to be updated on the employee job record. We highly recommend using the wording below when submitting CPAF for Faculty Development Leave (FDL) employees. Note: Change the information that is highlighted in yellow by populating it with your information.



For the proposed Start/End date section, provide the dates the employee will be on developmental leave. See the example below:



In the Proposed Cost Center section, indicate the employee's salary during developmental leave. Please double-check that the "Annual Amt" column contains the payment amount the employee will receive during Developmental Leave. (Note: "Annual Amt" may not change for employees on FDL for one semester. Please refer to the approved FDL form).

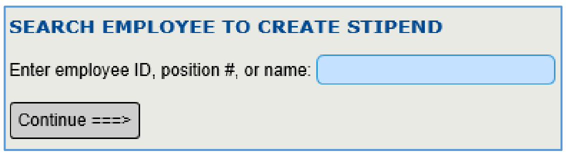


Stipends (faculty and staff)

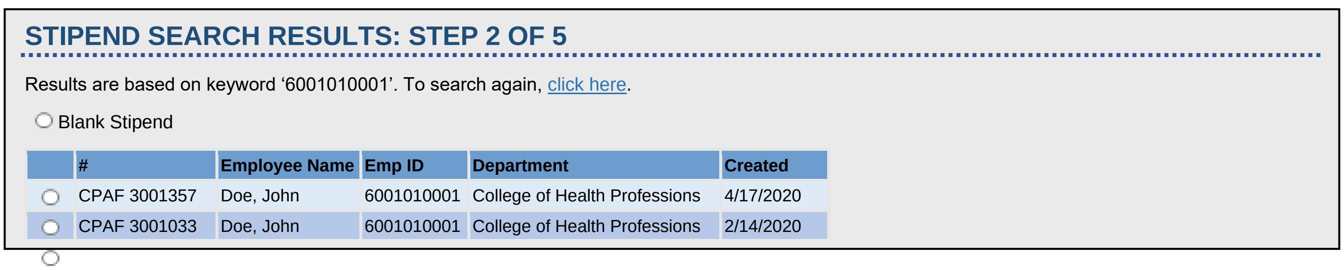
Stipends are used to process an added job for an employee (faculty or exempt staff) outside their normal job duties for a specific period. *Stipends do not apply to student employees or non-exempt staff.*

A stipend can be tied to the primary position number of the employee if all position data elements are the same. If any data elements are different, a new non-budgeted position should be requested. Go to the Position Control website (www.utrgv.edu/planning-and-analysis/services-and-resources/position-control) for instructions on requesting a new position number.

Step 1: Enter employee ID, position #, or name.



Step 2: Select the position to which the stipend will be linked. If the employee has never had a stipend, the only position that will appear will be the employee's primary position. Click on this position to bring in the employee information. When the employee ID has multiple instances found with the search, make sure to select the correct one. If the employee does not have any lines, choose the Blank Stipend button.


STIPEND SEARCH RESULTS: STEP 2 OF 5

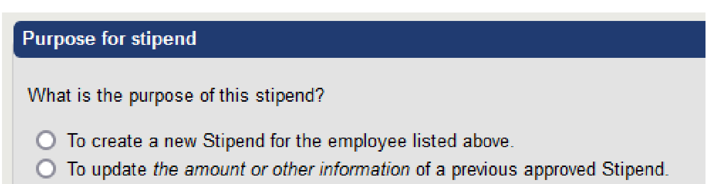
Results are based on keyword '6001010001'. To search again, click here.

Blank Stipend

	#	Employee Name	Emp ID	Department	Created
	CPAF 3001357	Doe, John	6001010001	College of Health Professions	4/17/2020
	CPAF 3001033	Doe, John	6001010001	College of Health Professions	2/14/2020

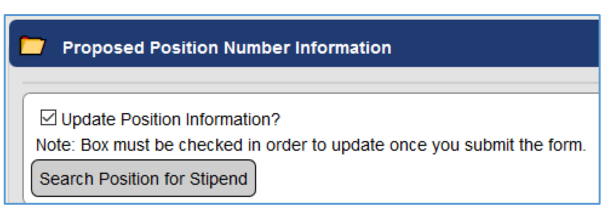
Purpose for Stipend

When creating a stipend, you will be asked for the purpose, either to create a new stipend for the employee or to update the information of a previous approved stipend.



If you requested a new non-budgeted position, you may search for the position number by selecting the checkbox labeled "Update Position Information?". All the data in the following three sections will change according to what was requested.

Search for a position as instructed on page 9.



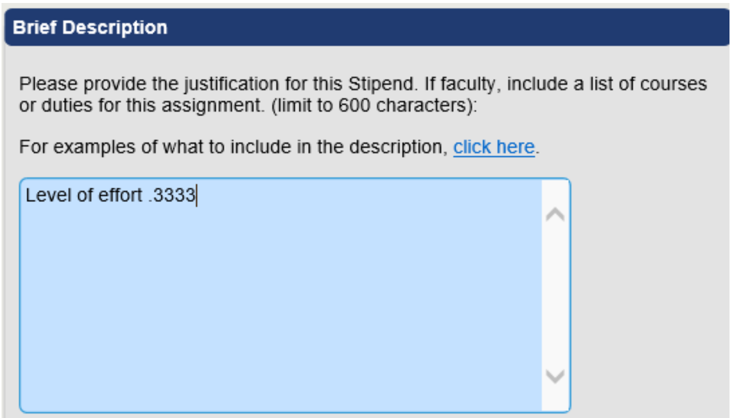
Update other fields as needed. Instructions for other fields are the same as found on pages 10 -11.

Brief Description

Departments can use the link provided below. It is a guide containing Human Resources' recommended comments to be used as brief description information. The recommended comments are examples that can be used for CPAFs or Stipends.

Note that for faculty stipends, the level of effort must be included in the brief description.

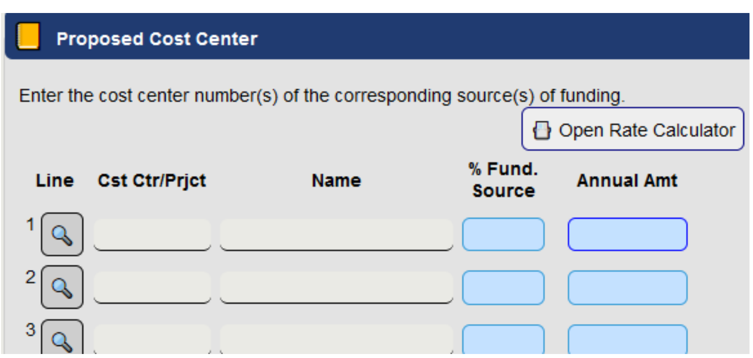
www.utrgv.edu/hr/_files/documents/jobs/EPAF-brief-description-examples.pdf



Start/End Dates

When entering the start and end date for a stipend, please note that a one-day stipend is not allowed. A stipend must be created for a minimum of two days or more. For example, if you are wanting to pay a stipend for work done 06/01/2021, you will use the proposed start date of 06/01/2021 and the proposed end date of 06/02/2021. See the example below.

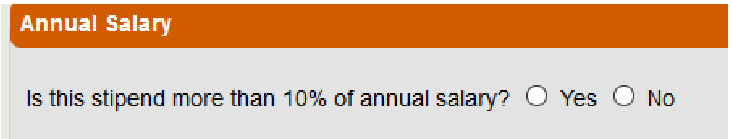
Proposed Cost Center/Project and Assignment Amount



Search for the cost center(s)/project(s) if this needs to be change from what may already be populated. If entering more than one cost center/project the percentages of funding must add up to 100%. Enter the amount to be paid for the assignment and the proposed encumbrance.

Annual Salary

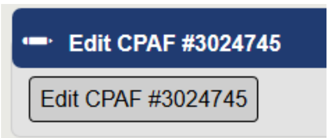
If selecting a position with an employee classification of CL, CLN, AP or APN and the primary assignment of the employee is non-faculty, the system will ask if the stipend is more than 10% of the annual salary.



Editing EPAFs, CPAFs, and Stipends

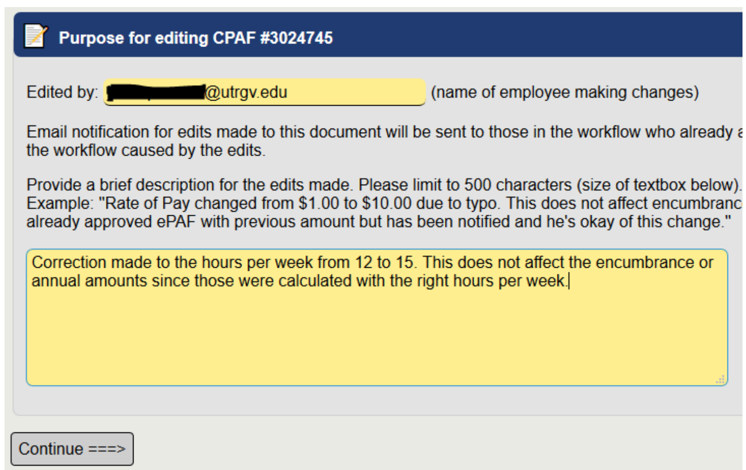
If EPAFs, CPAFs, and Stipends have not reached Position Control or Human Resources for approval, the creators, reviewers, and assistant deans can edit any proposed section and departments in the workflow and can edit certain sections of the EPAF. One of the sections that cannot be edited is the workflow section. Human Resources is the only department that can modify the workflow such as changing the project manager or reviewer.

To make an edit, click on the “Edit CPAF” button found at the top right side of the page.



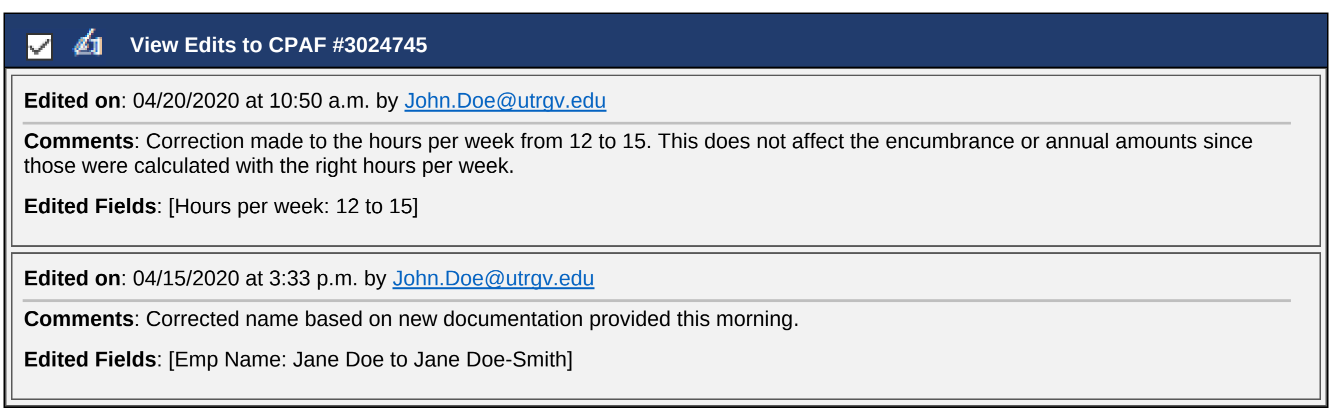
Depending on your workflow role as listed before, you will be able to edit certain sections of the EPAF.

Once the edit is made, provide a description for the edits made and click on Continue.



An email notification will be sent out to those who approved and indicates which areas of the EPAF were modified along with the comment.

If you want to read what other changes have been done to the EPAF, open the EPAF and click on the checkbox next to the “View Edits” section found at the bottom of the page. It will display a list of the edits performed.



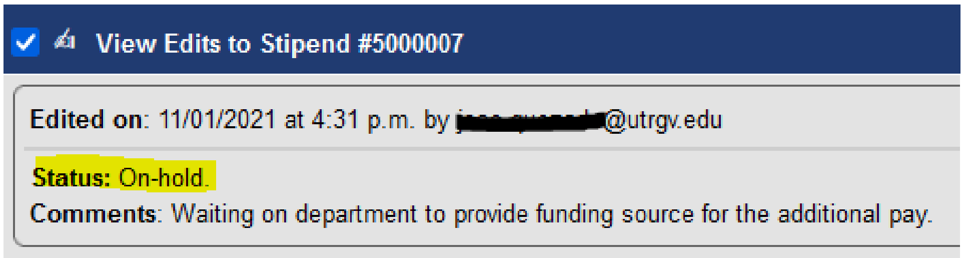
Depending on what was edited, the workflow is automatically updated. For example, if the question about Visa is changed from “No” to “Yes,” the workflow will include International Office and they will need to approve before reaching Position Control or Human Resources.

EPAF On-Hold

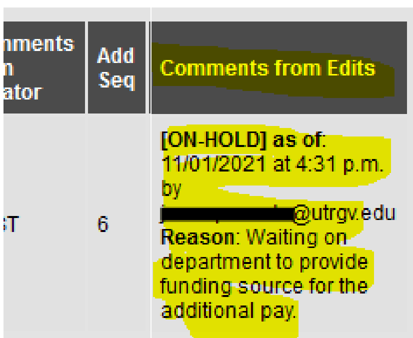
There could be cases where Position Control or Human Resources may be waiting for a document or additional information from the department or employee to be hired before they can approve an EPAF. When this happens, Position Control or Human Resources will provide a comment documenting the reason for this hold.

The comments for the EPAF when the status is on-hold can be viewed in the "View Edits" section of the EPAF and under the Reports (last column) labeled "Comments from Edits."

From View Edit:



From Reports:



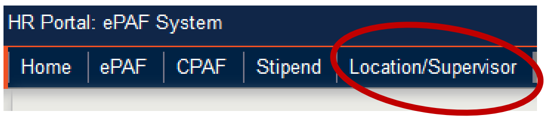
Location/Supervisor Changes (CPOS)

Purpose for Location/Supervisor Changes

If the only change to an employee's information is the supervisor and/or location (building and/or office number), you should complete a Location/Supervisor form. This form is a shorter version of the CPAF and does not require additional information such as cost centers and workflow approval other than Position Control and Human Resources. If, however, there are changes other than the supervisor and/or location, submit a CPAF, which also includes these two options.

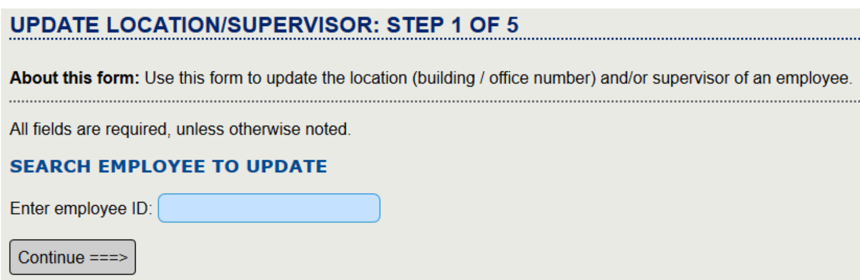
Note: Employees cannot submit a location/supervisor change for themselves. A supervisor or someone else should submit the update.

Select "Location/Supervisor" from the top menu.



Searching for Employee

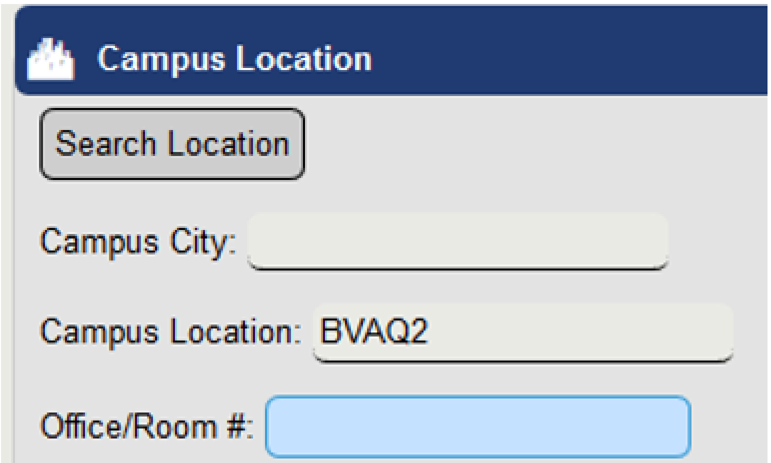
Search for the employee based on his/her employee ID or the employee's first or last name.



From the list of results, select the position requiring a change.

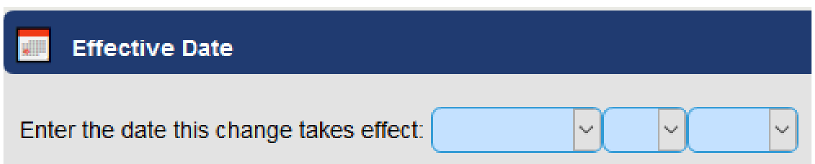
If the Reports to/Supervisor needs to be updated, click on the checkbox to select the "Reports To" position number.

If the campus location needs to be updated, click on the "Search location" button for a listing of buildings and update the office/room number accordingly.



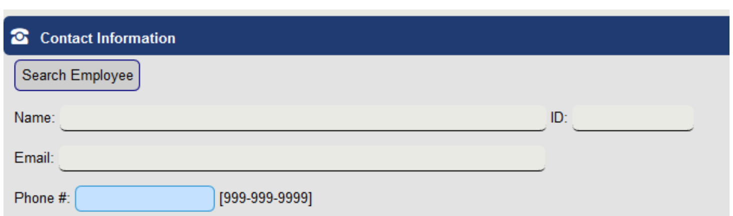
Effective Date

Enter the effective date of the change. In most cases, this date should not be before the 1st for the current month.



Contact Information

The contact information is needed in case Position Control or Human Resources has other questions. Click on the "Search Employee" button to select the contact's name from the list and to have the system populate the fields accordingly. The phone number must be typed in.



Click on Submit to complete the process.

Note: Position Control and Human Resources are the only approval needed for this type of form.

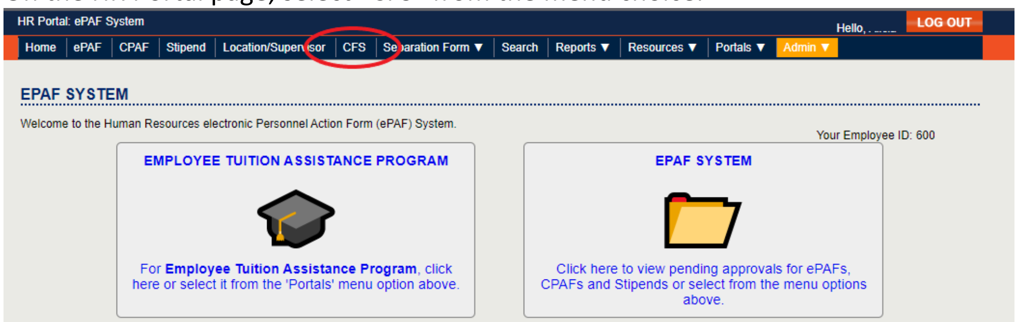
Change of Funding Source (CFS)

Purpose for Change of Funding Source

The development of this form is for processing funding updates to employee current assignments. It is important to note that this form will not update the employee salary, assignment dates, or position information. This form will reduce the number of workflow approvers which in turn will reduce the amount of time to approve the fund changes.

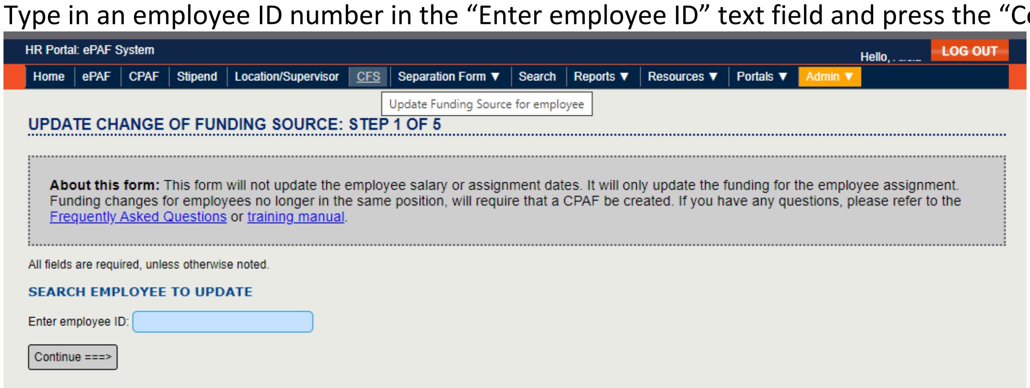
Navigating to the Change of Funding Source

On the HR Portal page, select “CFS” from the menu choice.

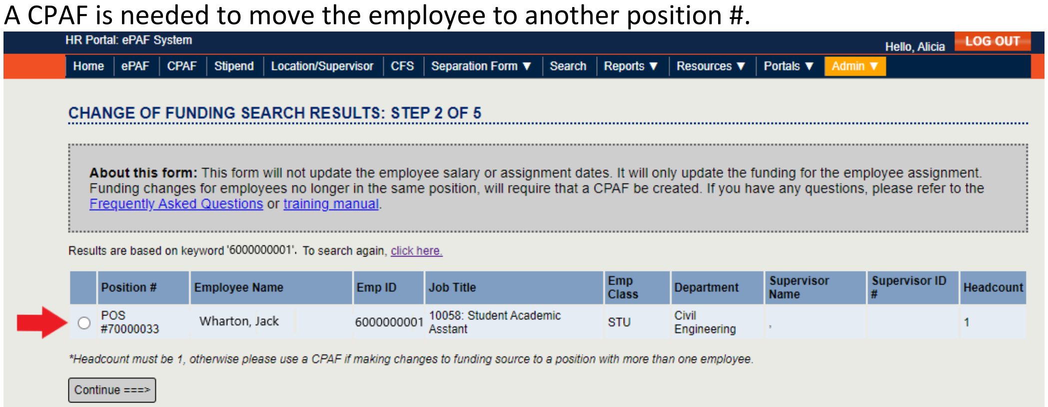


Searching for Employee to Update

Type in an employee ID number in the “Enter employee ID” text field and press the “Continue” button.

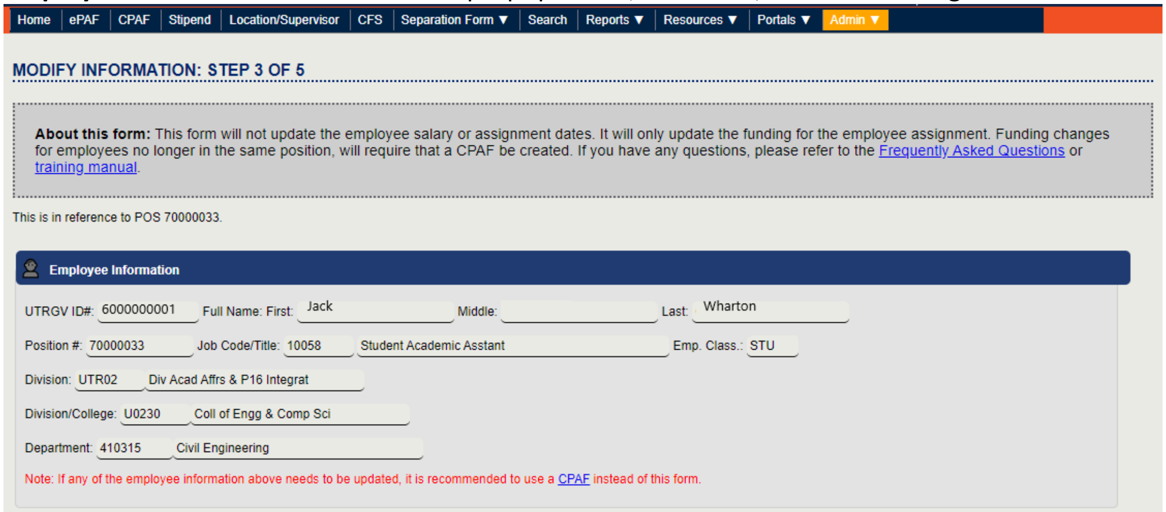


There may be instances where more than one line will appear; select the assignment needing to be changed and press the “Continue” button. Note that you cannot continue if there is currently more than one person tied to the position. A CPAF is needed to move the employee to another position #.



Employee Information

Employee Information – This section is prepopulated; therefore, cannot be changed. A CPAF or CPOS is needed instead.


Home | ePAF | CPAF | Stipend | Location/Supervisor | CFS | Separation Form ▼ | Search | Reports ▼ | Resources ▼ | Portals ▼ | Admin ▼

MODIFY INFORMATION: STEP 3 OF 5

About this form: This form will not update the employee salary or assignment dates. It will only update the funding for the employee assignment. Funding changes for employees no longer in the same position, will require that a CPAF be created. If you have any questions, please refer to the Frequently Asked Questions or training manual.

This is in reference to POS 70000033.

Employee Information

UTRGV ID#: 6000000001 Full Name: First: Jack Middle: Last: Wharton

Position #: 70000033 Job Code/Title: 10058 Student Academic Assistant Emp. Class.: STU

Division: UTR02 Div Acad Affrs & P16 Integrat

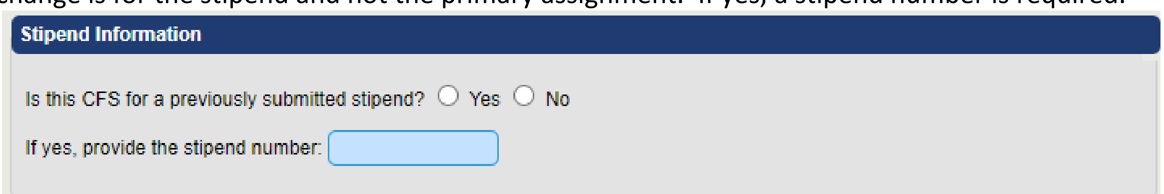
Division/College: U0230 Coll of Engg & Comp Sci

Department: 410315 Civil Engineering

Note: If any of the employee information above needs to be updated, it is recommended to use a CPAF instead of this form.

Stipend Information

Stipend Information –Since a stipend can be submitted with the employee's primary position # we need to know if the change is for the stipend and not the primary assignment. If yes, a stipend number is required.

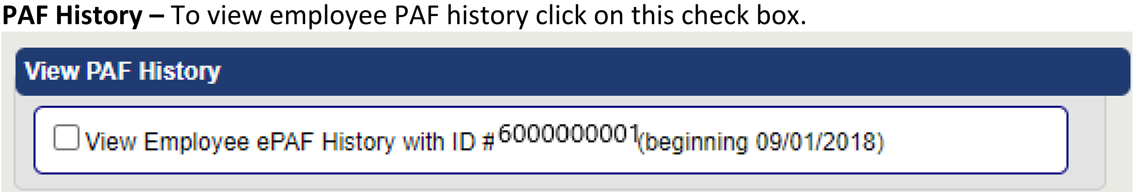

Stipend Information

Is this CFS for a previously submitted stipend? ○ Yes ○ No

If yes, provide the stipend number:

PAF History

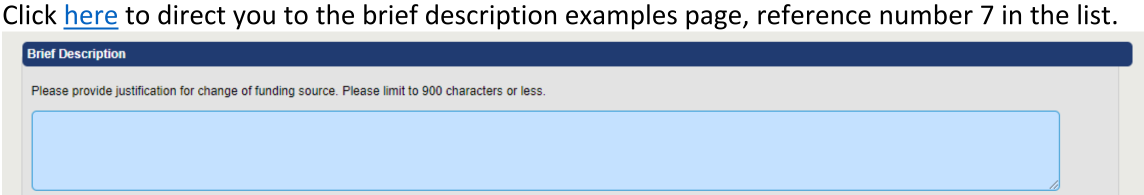
PAF History – To view employee PAF history click on this check box.


View PAF History

☐ View Employee ePAF History with ID # 6000000001 (beginning 09/01/2018)

Brief Description

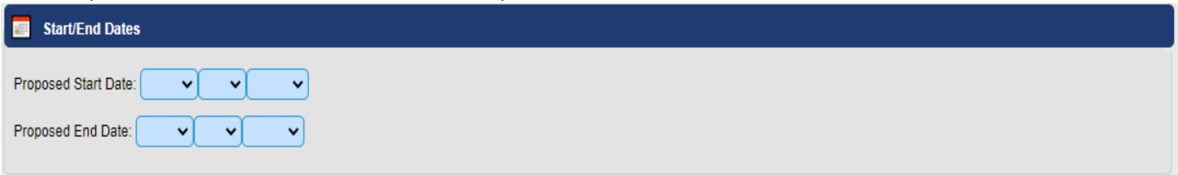
Brief Description – Type a brief description justifying the change of funding source, there is a limit of 900 characters. Click here to direct you to the brief description examples page, reference number 7 in the list.


Brief Description

Please provide justification for change of funding source. Please limit to 900 characters or less.

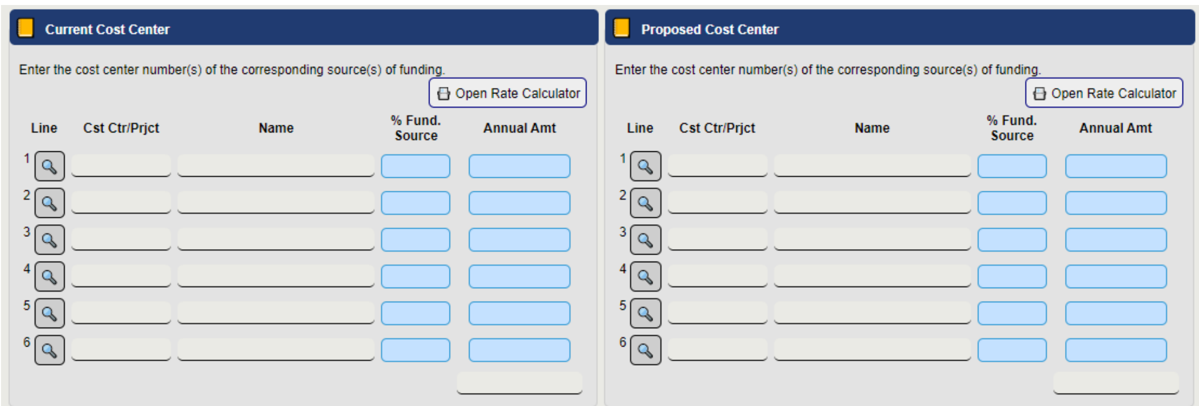
Funding Start/End Dates

Funding Start/End Dates – Using the dropdown arrows, select the funding start and end dates. The funding changes will only be made effective for the dates specified in this section.



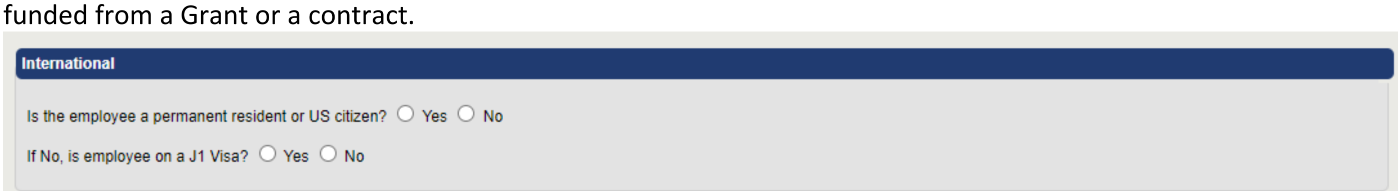
Cost Center

Cost Center – Using the magnifying glass icon for each line item, select the current and proposed cost center numbers. Populate the funding source percentage and the annual amount for both the current and proposed cost center sections.



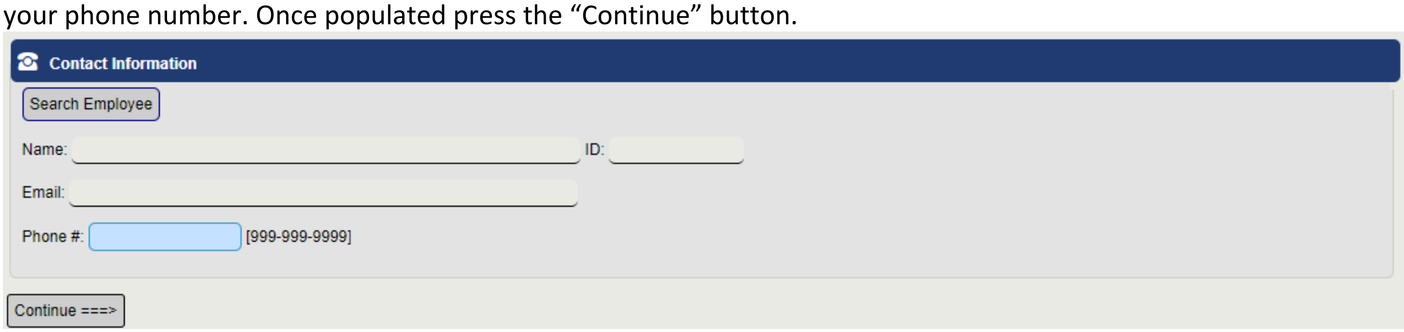
International

International – Indicate whether the employee is a permanent resident or a US citizen, if no, a response to the subsequent question is needed. This information is needed for further review by the Grants and Contract office if funded from a Grant or a contract.



Contact Information

Contact Information – Use the "Search Employee" button to populate the contact information and manually type in your phone number. Once populated press the "Continue" button.



The Workflow approval section is the same as described on page 15.

Separations

The design of the Separation Process is to assure that all departing employees and Person of Interest (POI) properly separate from UTRGV, and that any university property is cleared before departure from The University of Texas Rio Grande Valley. This procedure applies to all existing university employees and POI's regardless of classification.

Unlike the EPAF, there will be NO workflow involved. The system will send email notifications to various departments.

Note: If an employee is moving from one department to another or leaving for less than three months, you should use a CPAF instead. This does not apply to POI, a separation for POI must be submitted as soon as the supervisor is aware that the POI will no longer be affiliated with UTRGV.

To begin, click on "Separation Form" from the EPAF system menu and select "Create Separation Form."

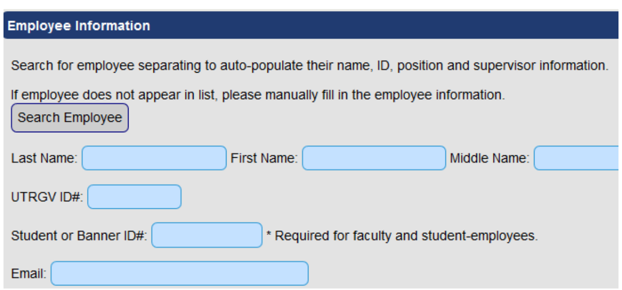
In the Separation Process screen, you have a choice to either create a Separation Form for a UTRGV Employee or a Person of Interest (POI).

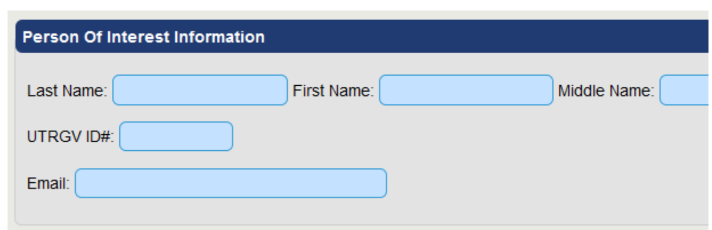
Select POI only if the person separating from the institution is a non-UTRGV employee.

Employee Information / Person of Interest Information

Under the "Employee Information" section, click on the "Search Employee" button and enter the employee ID to select the employee information that will prepopulate most of the fields in the Separation form. If the employee information is not prepopulated, you may complete the section manually.

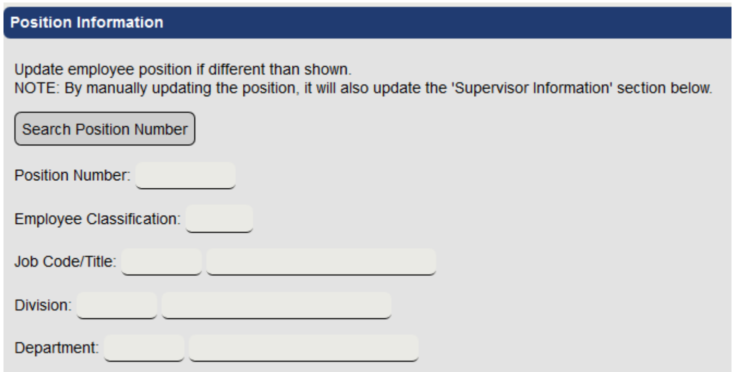
***Note**: For a POI Separation, enter all required information (name, UTRGV ID, and email).*





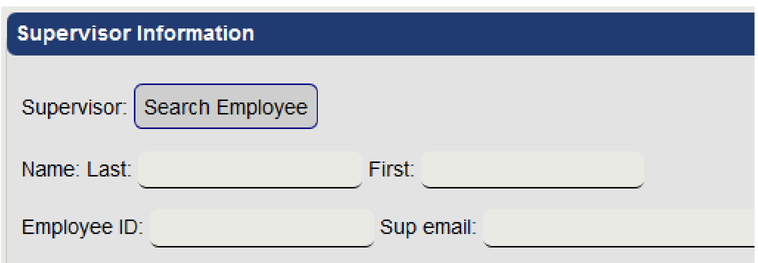
Position Information

If selecting an employee, position information should already be prepopulated, but if entered manually or need to be updated, click on the "Search Position Number" to select the position number that corresponds to the employee's job title and department. This only applies to an employee separation; it is not needed for a POI separation.



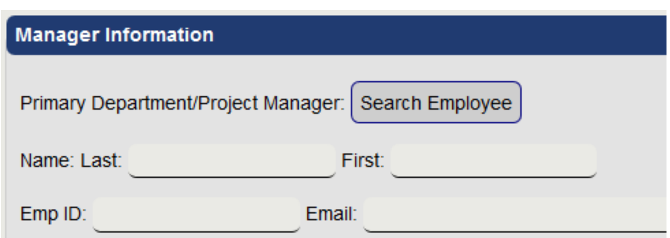
Supervisor Information

The Supervisor information should already be prepopulated, but if it is blank or needs to be entered manually, click on the “Search Employee” button to update.



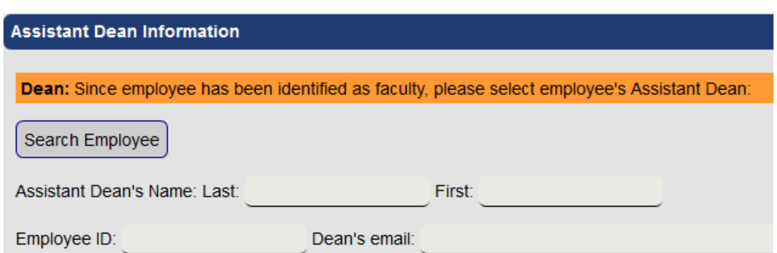
Manager Information

Select the primary department/project manager to receive the employee separation notification. Note: This does not apply to a POI Separation.



Assistant Dean Information

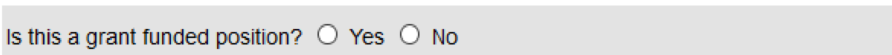
If the employee classification is a faculty, the assistant dean information is needed. Note: This does not apply to a POI Separation.



International Employee and/or Grant Funded position

If the employee is on a sponsorship Visa, select "Yes" and specify the type of Visa the employee is working under. Otherwise, select "No" and leave the Sponsorship field as "None." This is to notify the International Office via email of the employee separation. Note: This does not apply to a POI Separation.

Select if the employee is under a grant-funded position. This is to notify Grants & Contracts.

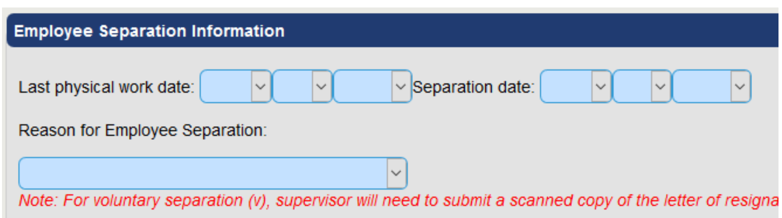


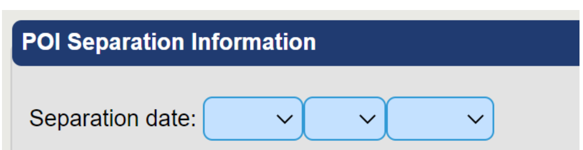
Employee Separation Information

Use the dropdown arrows to select the last physical work date. This is defined as the last actual physical working date in the institution.

Using the dropdown arrows, select the Separation date. This is defined as the last official day of employment.

For example, if the last day of an employee is on March 19, but he will use full-time vacation on the last three days of work (March 17-19), then his last physical work date will be March 17 and his separation date will be on March 19. The separation for POI only requires a Separation Date.





Reasons for Employee Separations

Select the reason why the employee is separating from the institution. The list of reasons is categorized as voluntary and involuntary.

Reasons for Employee Separation

Voluntary	**Involuntary**
• Dissatisfied with type of work • Failure to return to work from leave • Job Abandonment • Other UT Institution • Separation Incentive Program • Retirement • Transfer to a different state agency	• Conduct • Deceased • End of Assignment • Gross misconduct • Loss of [employment] eligibility • Performance • Probation Period

• Resigned: Better Opportunity • Resigned: Better Pay/Benefits • Resigned: Job dissatisfaction • Resigned: Relocation • Resigned: In lieu of termination • Resigned: Personal reasons not related to job • Resigned: Non-rehired settlement agreement	• Reduction in force • Termination of elected benefits • Violation of rule or law

Note: For voluntary separation (v), the supervisor will need to send a scanned copy of the letter of resignation to the Office of Human Resources at HR@utrgv.edu.

Contact Information

Provide the contact information in case there are any questions regarding the form.

Supervisor Checklist for Employee Separation

Supervisors have the responsibility to properly exit an employee. The checklist included in the form will function as a guide to ensure pending items are completed or returned before the issuance of the employee's final paycheck.

Checklist

As supervisor, it is your responsibility to properly exit an employee. The checklist below will act as guide to ensure pending items are completed or returned prior to the issuance of the employee's final pay check.

Note: Supervisors may complete this checklist at a later time from the 'View employee separation' option.

Yes	N/A	
○	○	Inform employee to submit **final timecard** through Time Entry function in PeopleSoft.
○	○	Collect **university equipment** such as ipad, secure USB flash drive, laptop, and/or any other equipment that belongs to the institution, and keep inventory.
○	○	Collect **procurement card** and/or **travel cards**, if any, and forward them to the Purchasing Office.
○	○	Inform employee to submit **keys** to the Facilities Operations Department (this includes vehicles keys or keys to any other facility or equipment).
○	○	Collect **employee id card** and submit to V One Card Services in Brownsville at Campus Bookstore and in Edinburg at ESTUN 2.310.
○	○	Collect **employee access card** (if any) and submit to the UTRGV University Police Department.
○	○	Inform the employee to contact Parking and Transportation for any pending **parking fines** and **parking permit fees** including possible refunds upon the return of their **permit**.
○	○	Inform the employee to contact the **Office of Human Resources** to facilitate separation.
○	○	Inform the employee to contact the **university library** for any pending fees/checked out items.
○	○	As a reminder, if employee is a Project Manager (Grants), please contact Grants Accountant. If employee is a cost center manager, please submit a new UTRGV Cost Center Key Member Update via PeopleSoft with the name of the new employee responsible for the Cost Center number(s).

Supervisor Checklist for POI Separation

Checklist

As supervisor, it is your responsibility to properly exit a POI. The checklist below will act as a guide to ensure pending items are completed or returned to The University of Texas Rio Grande Valley.

Note: Supervisors may complete this checklist at a later time from the 'View POI separation' option.

Yes	N/A	
○	○	Collect **university equipment** such as ipad, secure USB flash drive, laptop, and/or any other equipment that belongs to the institution, and keep inventory.
○	○	Inform POI to submit **keys** to the Facilities Operations Department (this includes vehicles keys or keys to any other facility or equipment).
○	○	Collect **POI id card** and submit to V One Card Services in Brownsville at Campus Bookstore and in Edinburg at ESTUN 2.310.
○	○	Collect **POI access card** (if any) and submit to the UTRGV University Police Department.
○	○	Inform POI to contact Parking and Transportation for any pending **parking fines** and **parking permit fees** including possible refunds upon the return of their **permit**.
○	○	Inform POI to contact the **university library** for any pending fees/checked out items.

Submit form

Click on the continue button to have the system verify the Separation form for any missing data. After review, scroll down to the bottom of the page and send. The email notifications will be sent to several departments so that they can take the proper action from their side.

There are at least three different emails notifications sent out:

Email to Employee Separating. If the employee is a full-time employee, depending on their employee classification, they will receive an email with a link to complete the exit form and a list of the supervisor checklist. Note: The link to complete the exit form does not apply to POIs.

Email to departments: This includes assistant deans, Grants and Contracts, and International Office if required from the form. The creator of the form also receives the notification along with the manager.

Email to Supervisor: Same as the email to the department, except that it also includes the checklist for reference purposes.

Employee Classifications

Code	Description	Assigned Job Codes
AP	Admin. & Professional Staff	Varies
APN	AP Wages Acct	10997: Special Assign Faculty, 10999: Special Assign Staff
CL	Classified Staff	Varies (exempt and non-exempt staff)
CLN	Classified Staff Wages	10061: PT Non-Stdt, 10995: Spec Assign, 10998: Temp Spec Assign
FA1	Faculty Tenure	Varies
FA2	Faculty Non-Tenure	Varies
FA3	Faculty Summer	Varies
FA4	Faculty SOM –12 months	Varies
RES	Resident (School of Medicine)	10149: Chief Res, 10150: Res PGY 1, 1051: Res PGY 2, 1052: Res PGY 3, 10153: Res PGY 4, 10154: Res PGY 5
GRA	Graduate Research Assistant	10064: Asst Instr, 10081: Res Asst WS, 10082: Grad Asst WS, 10095: Res Asst, 10096: Grad Asst
GTA	Graduate Teaching Assistant	10047: Teaching Assistant, 10080: Teach Asst WS
STU	Students	10056: Temp Stdt, 10057: Stdt Acad Tutor, 10058: Stdt Acad Asst, 10059: Stdt Asst, 10060: Stdt Proj Assc, 10065: SEI, 10094: AmeriCorp
WS	College Work-Study	10039: Grad Stdt Ws, 10051: WS Stdt Aca Tutor, 10053: WS Stdt Aca Assist, 10054: WS Stdt Asst, 10055: WS Stdt Proj Assoc

Employee Classifications for Staff

The staff classification refers to a position such as an exempt staff, direct wage, and work-study.

Staff Classifications for EPAF and CPAF:

- Administrative and Professional Staff
- College Work-Study
- Direct Wage (student employee)
- Exempt Regular
- Non-Exempt Regular
- Student Employment Initiative (SEI)
- Temporary Non-Exempt Staff
- Temporary Student

Direct Wage/Student Employment Initiative/Work-study/Part-Time Non-Student

A candidate for this position should have less than or equal to 19 hours weekly. These classifications require a Career Posting Number (Job ID), which is provided on the Handshake website. A link to the Handshake website is found on the Link section of the Resources menu of the EPAF system.

Any direct wage position with an hourly rate of $13 or above will need to go through an approval process with HR Compensation. To ensure any hourly rates discussed with a temporary worker are suitable, start this conversation throughout the posting process.

College Work-Study employees (WS)

This position applies to students who can work as College Work-Study for Fall, Spring, and/or Summer as approved by the Financial Aid Office. If hired in the summer, the student must be enrolled a total of six hours or more for the summer and may only work during the summer semester enrolled as a student. The May session is considered part of Summer I.

Example: College Work-study Employee for Summer Sessions

- If a student is enrolled 4 hours for Summer I and 3 hours for Summer II, the student will qualify to work all summer as work-study since the total hours is more than 6.
- If a student is only enrolled for Summer II, then the total hours enrolled should be at least 6 and may only work as work-study for Summer II.
- If an employee is enrolled 2 hours for the May session and 4 hours for Summer I, the student may qualify to work for Summer I as a work-study since the total hours are at least 6.

Student Employment Initiative (SEI)

To speed up the approval process for SEIs, it is recommended for students to upload the following documentation to their Career Connection profile before the EPAF is created:

- Resume
- Class Schedule (for the semester they are applying)
- Unofficial Transcript

Temporary Student

A student employee hired as a Temporary Student can work up to 40 hours only during the summer period (May 1 – August 31) and must not be taking courses concurrently during the period of assignment. For example, if Jane Doe is not taking courses in May but will be taking summer courses beginning June 4th, Jane can only have the assignment of Temporary Student on or after May 1st and up to June 3rd. After that, she would need to be changed into a student employee position that does not exceed 19 hours per week.

Part-Time Non-Students

Part-time jobs that do not require a bachelor's degree or are for clerical duties must be performed by students enrolled during the period of assignment. Only the part-time jobs that require specific skills and/or education can be performed by non-students. Part-time non-students' employees cannot work more than 19 hours per week and the department must provide a reason for hiring a non-student for the part-time position.

Example: Part-Time Job for Students and Non-Students

Required to be performed by students

- Clerical duties such as:
  - Help the front desk
  - Answer office phone calls
  - To file or enter data
  - Maintain and reconcile ledgers
  - Create reports

Acceptable for non-students

- Technical IT work that requires system knowledge
- Special project administration such as:
  - Interpreter
  - Counseling and advising

Temporary Non-Exempt Staff

An employee hired as Temporary Non-Exempt Staff can work between 20 to 40 hours for up to 90 days (if direct wage with no benefits) or 4 ½ months (if direct wage with benefits). After reaching the limit, the employee must wait 13 months from the last day they worked as Temporary Non-Exempt staff to reapply for that classification/job code description again. Under a different title, the individual could work up to 19 hours each week. Please contact Salary Administration for hiring recommendations or contact HR-Compensation to discuss establishing a permanent position if any further time is required after completing either the 3 or 4 ½ months.

Example: Temporary Non-Exempt Staff

Suppose John Smith worked as Temporary Non-Exempt Direct Wage (with no benefits) from January 1 – January 31st. Then he worked again from April 1 – April 30. That is already two months' worth. Then he worked from June 1 to June 30. That completes the three months of work.

This means that if he wants to work again as a Temporary Non-Exempt, he will have to wait 13 months since his last day on June 30, which would fall any time after August 1st of the following year.

Workflow

The following workflows apply to all EPAFs, CPAFs and Stipends.

Faculty and Graduate Assistantship Workflow

FA1: Faculty Tenure
FA2: Faculty Non-Tenure
FA3: Faculty Summer
FA4: Faculty (12 mos)
APN: Special Assignment Faculty
RES: Residents
GRA: Graduate Assistantship
GTA: Graduate Teaching Assistant

		Hiring Official	Reviewer	Manager	International Admission^	Graduate Office	Grants & Contracts^^	Financial Aid	Assistant Dean	Vice President	Academic Affairs~	Position Control	Human Resources
FA1	**Academic Affairs**		-		-		-		✓		✓	✓	✓
	Health Affairs	✓	-	✓	-		-		✓			✓	✓
	School of Medicine	✓	-	✓	-		-			✓ *		✓	✓
FA2	**Academic Affairs**		-		-		-		✓		✓	✓	✓
	Health Affairs	✓	-	✓	-		-		✓			✓	✓
	School of Medicine	✓	-	✓	-		-			✓ *		✓	✓
FA3	**Academic Affairs**		-		-		-		✓		✓	✓	✓
	Health Affairs	✓	-	✓	-		-		✓			✓	✓
	School of Medicine	✓	-	✓	-		-			✓ *		✓	✓
FA4	**School of Medicine**	✓	-	✓	-		-			✓ *	✓	✓	✓
APN	*10997: Special Assignment Faculty*	✓	-	✓	-		-		✓		✓	✓	✓
RES	**School of Medicine**		-	✓	-		-			✓ *		✓	✓
GRA	*10064: Assistant Instructor****		-		-	✓	-		✓ ^				✓
	10081: Research Assistant WS		-		-	✓	-	✓	✓ ^				✓
	10082: Graduate Assistant WS		-		-	✓	-	✓	✓ ^				✓
	10095: Res. Assist, 10096: Grad. Assist.		-		-	✓	-		✓ ^				✓
GTA	*10080: Teachnig Assistant WS*					✓		✓	✓ ^				✓
	10047: Graduate Teaching Assistant		-		-	✓	-		✓ ^				✓

**VP for School of Medicine.* *~Previously role for Provost* ****If Graduate Assistantship, Vice President is included.*
^Excludes Assistant Dean approval in Academic Affairs.

Faculty/Graduate Assistantship Workflow:

1. **Hiring Official**: This is the person responsible for the college or department.
2. **Manager Reviewer (optional)**: A department may add a reviewer of their choice to approve before the manager.
3. **Manager**: Is the Project Manager based on cost center or project used in the EPAF.

4. ^**International Admission and Student Services**: For Students with a F1 Visa, the International Admissions and Student Services office will be included in the workflow. For a J1 Visa, the International Program & Partnerships office will be included in the workflow. For Resident positions with a J1 Visa, the Graduate Medical Education office will review workflow. For all other staff positions, the Immigration Services Manager will be included in the workflow.
5. **Graduate Office**: If the Graduate Assistantship and total enrolled hours (academic) are less than 9 (for fall and spring) or less than 6 hours (for summer) and the student is not graduating, a justification will be needed, with the Graduate Office being included for approval.
6. ^^**Grants and Contracts**: The Grants and Contracts office is included in the workflow when the budget is from a grant or cost-share. For cost centers with funding 5500 or 5600 as restricted accounts, Grants Accounting will be included in the workflow instead.
7. **Assistant Deans**: Assistant deans are included for faculty and graduate assistantship positions. They are added automatically based on the college selected.
8. **Vice President:** Vice Presidents are included in workflow for all faculty positions.

   ***If it is a Graduate Assistantship, the Vice President is included only for "10064-Assistantship Instructor".
9. **Academic Affairs**: This was previously the role of Provost.
10. **Position Control**: Included in faculty positions and only where there is a change to Graduate Assistantships.
11. **Human Resources**: Once reviewed and approved by HR, an email notification is sent out to the creator, manager, and supervisor of the EPAF to let them know that the employee is cleared and may begin employment on the date specified by HR (if different than proposed).

Student and Staff Workflow											
		Reviewer	Manager	International Admission^	Financial Aid	Grants & Contracts^^	Student Employment	Vice President~	Compensation Office	Position Control	Human Resources
AP	**Administrative & Professional Staff**	-	✔	-		-		✔	✔ +	✔	✔
APN	*10999: Special Assignment A&P*	-	✔	-		-			✔ +	✔	✔
CL	**Classified Staff**	-	✔	-		-			✔ +	✔	✔
CLN	*10995: Special Assignment Classified Staff*	-	✔	-		-			✔ +	✔	✔
	*10998: Temp Staff Assignment **	-	✔	-		-			✔ +	✔	✔
	*10061: Part-Time Non-Student (Academic Affairs)***	-	✔	-		-	✔				✔
	*10061: Part-Time Non-Student ***	-	✔	-		-	✔	✔			✔
STU	**10065: Student Employment Initiative (SEI)*****	-	✔	-		-	✔				✔
	10094: AmeriCorps***	-	✔	-	✔	-					✔
	Other***	-	✔	-		-	✔				✔
WS	**College Work-Study*****	-	✔	-	✔	-	✔				✔

^International Admission and Student Services, International Program & Partnerships, Graduate Medical Education, Immigration Services Manager – For international or VISA employees.

^^Grants and Contracts Office – when budget from a grant or cost-share is used.

** Up to 4 ½ months with 20 – 40 hours per week.*

*** Up to 19 hours per week.*

**** Position Control will be included in workflow if there is a change to the position.*

~ Excludes VP Academic Affairs.

✔ + *For stipends with staff positions and where the primary assignment of employee is non-faculty.*

Logging in after timeout

The system will timeout after 20 minutes of inactivity. When this happens, click on the banner on top of the page and re-enter your credentials. After that, you may close the pop-up screen and continue working where you left off. This prevents the loss of data that has been entered.

Requesting Access to EPAF System

Access to view/access EPAF System

By default, all UTRGV full-time employees should automatically have access to the EPAF system. There will be cases when an employee may not be able to access it because the employee:

- Has been recently hired (new employee)
- Changed his/her email address

Send an email to HR@utrgv.edu if access is needed. Once verified in PeopleSoft as an active employee, access will be granted.

Remember, when trying to access the EPAF system outside of campus, it requires to use a Virtual Private Network (VPN) connection. For more on VPN, visit www.utrgv.edu/it/how-to/create-virtual-private-network-connection/

Troubleshooting

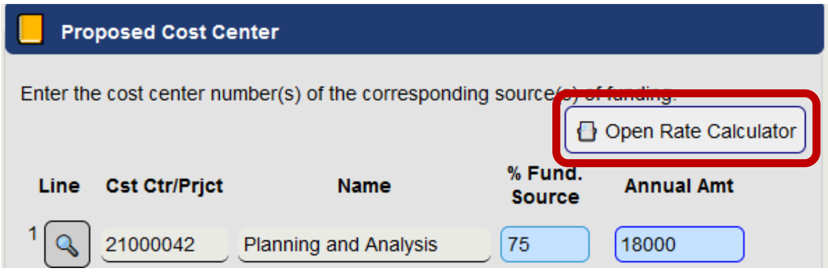
Form does not display when trying to view or approve

This happens on certain browsers such as Safari for mobile devices. Using another browser such as Firefox or Chrome should be able to fix this issue.

Tools

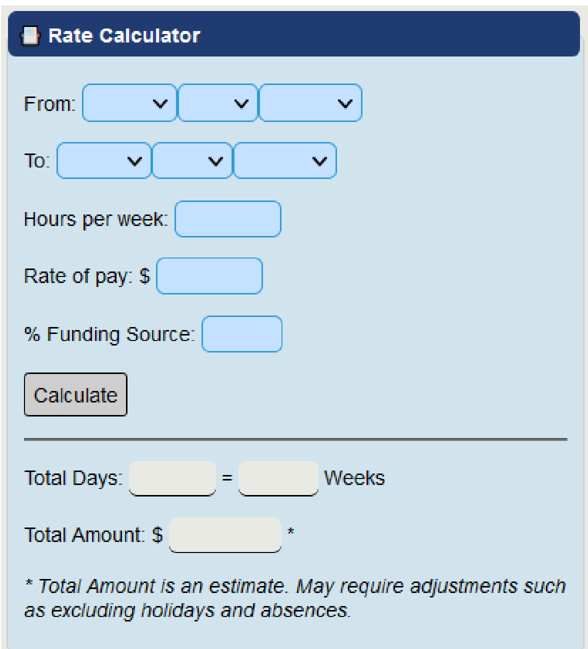
Rate Calculator

Although not required in the EPAF system but requested by popular demand, a Rate Calculator is available in the Proposed Cost Center section of the EPAF system for departmental use. To access it, click on the "Open Rate Calculator" button found on the top-right side.



The calculator will open in a new window.

Enter the date range, hours per week, rate of pay, percentage of funding source, and press "Calculate."



The results will provide the total number of days in weeks and the total amount. Please note that the results are just an estimate since it does not exclude holidays and absences during the date range.

Brief Description Examples

The following are examples of what to include in the Brief Description box for a CPAF or Stipend in the EPAF System.

Scenarios

1 Reducing the employees' hours

Example of *Brief Description:*

This CPAF is to reduce the employee's hours per week from 19 to 10 hours per week from 6/15/2020 to 7/31/2020.

2 Changing the employee's classification

Example of *Brief Description*

Note: This will require a different position number.

This CPAF is to change the employee's classification from Work-Study to Student Employee. The employee ran out of Work-Study funds and will be changed to Student Employee funds effective 5/4/2020 and until the remainder of the assignment.

3 Adding an additional assignment

Example of *Brief Description:*

This CPAF is to add a secondary assignment. This employee is currently working at [department name] with 9 hrs. per week and will be starting the secondary assignment at [department name] with 10 hrs. per week from 6/01/2020 to 8/31/2020.

4 Creating a special assignment for a staff employee

Example of *Brief Description:*

This stipend is to cover additional shifts worked at Knap Hospital for the month of April 2020 for the total amount of $XXX. XX.

If grant-funded, include in the description how this assignment is justifiable to the grant.

Example of *Brief Description*:

This stipend is for [*mentorship*/ workshops/ fellowships, etc.] for the Spring semester. The stipend total amount is for $XXX. XX.

If grant-funded, include in the description how this assignment is justifiable to the grant.

5 Creating a special assignment for a faculty employee

Example of *Brief Description:*

This stipend is to cover faculty working on [**overload, Chair, Director, workshop, etc**.] for monthly amount of $2,000 ($4,000 total) from April 2020 thru May 2020.

If grant funded, include in the description how this assignment is justifiable to the grant.

6 Faculty Development Leave

The Brief Description information section is especially important for Human Resources, this is needed so that we understand what needs to be updated on the employee job record. We highly recommend using the wording below when submitting CPAF for FDL employees. Note that only highlighted in yellow is where information will be changing.

Example of Brief Description:

> This CPAF is being submitted due to [Faculty Name] will be on Faculty Developmental Leave effective [MM/DD/YYYY] and will end [MM/DD/YYYY]. FDL will be for [semester or academic year] and the faculty will be working at an FTE of [50%]. The employee salary [will be / will not be] reduced to [$$$$$$] during this time.

7 Change in funding

Example of *Brief Description:*

Note: If the current funding does not cover the entire fiscal year, please submit another CPAF.

> This CPAF is only to change the cost centers in which the employee is being paid out. Funding change is from 5/4/2020 through 6/30/2020.
>
> *If grant-funded, include in the description how this assignment is justifiable to the grant.*

8 Stipend being submitted to change a faculty overload amount

Example of *Brief Description*:

> This stipend is for the Spring overload on the employee's primary assignment from 01/16/2020 - 05/31/2020. The total added amount is $2,000.00
>
> *If grant-funded, include in the description how this assignment is justifiable to the grant.*

9 Updating the employee's contract amount

Example of *Brief Description*:

> This CPAF is to increase the employee's contract total amount. The employee's initial contract amount was $5,000 from 01/01/2020-05/31/2020, in which the employee received $1,000/month. We are adding $1,000 to the overall contract from 01/01/2020-05/31/2020 so that we may pay the updated total amount of $6,000.
>
> *If grant-funded, include in the description how this assignment is justifiable to the grant.*

10 Adding an employee incentive

Example of *Brief Description:*

> This stipend is for quarterly incentives for the employee. This payment covers 01/01/2020 - 03/31/2020 for the total amount of $XXX. XX.
>
> *Note: An employee incentive should NOT be grant-funded.*

Graduate Assistantship

11 Graduate Assistant (GRA/GTA)

Example of *Brief Description:*

Student will be assisting with *the website and reports needed for the department, which is related to the student's program of study*.

Reminder: Duties need to be related to the program of study or professional development.

12 Graduate Research Assistant (GRA/GTA)

Example of *Brief Description:*

Student is conducting research with XXXXX program.

13 Graduate Teaching Assistant (GRA/GTA)

Example of *Brief Description:*

Student will be assisting to teach class ART 3301-07 ART 3352-01.

14 Graduate Assistant or Associate Instructor (GRA/GTA)

Example of *Brief Description:*

Student will be Instructor of Record for the following classes: MGMT 3301-02 MGMT 3304-05 and holds the necessary 18 graduate credits in a discipline related to courses assigned.

15 Faculty Summer Stipend (Tenure or Non-Tenure) (FA3)

Example of *Brief Description:*

Faculty (Name) will be working on summer research activities from June thru August. The level of effort will be .333 the total amount to be paid is $XXXX.

(9month salary/3 months in summer = Summer cap * FTE = Stipend amount

$8,011.33 (stipend amount)/ $24,033.99 (summer 1/3rd cap) = FTE .333

- Note: FTE is required for summer stipends. When providing FTE, please provide at least 3 decimals.

16 Faculty Stipend Tenure or Non-Tenure (FA1 & FA2)

Example of *Brief Description:*

(Name) will be working as a nurse practitioner, seeing patients, 2 days a week.

16 hours a week @ $50.00/ per hour for 3 months (June – August)

16 hrs. x $50 = $800

$800 x 12 weeks = $9,600

17 Faculty Stipend SOM (FA4)

Example of *Brief Description:*

This stipend is a quarterly incentive based on wRVUs as per LOO dated 1/24/18. This payment covers 1/1/21 to 3/31/21. Total amount to pay is $XXXX. Spreadsheet Log with detailed information will be forwarded to the Salary Administration email for review.

***Note: HR needs spreadsheet/worksheet to process.**

18 Faculty Stipend SOM (FA4)

Example of *Brief Description:*

Faculty (Name) is working additional shifts as a hospitalist to assist the department with 24-hour coverage at Knapp Medical Center. He worked 5 day shifts @ $1380/shift in April. Total amount to pay is $XXXX. Spreadsheet Log with detailed information will be forwarded to the Salary Administration email for review.

***Note: HR needs spreadsheet/worksheet to process.**

19 Merit Increase

Example of *Brief Description:*

This CPAF submission is to increase the employee's salary to $XXXX.XX as the employee has received a merit increase effective 09/01/2020.

If grant-funded, include in the description how this assignment is justifiable to the grant.

20 Temporary Additional Duties

Example of *Brief Description:*

This CPAF submission is to temporarily increase the employee's salary to $XXXX.XX from 09/01/2020 to 12/31/2020 as the employee will be performing additional duties.

If grant-funded, include in the description how this assignment is justifiable to the grant.

21 Permanent Additional Duties

Example of *Brief Description:*

> This CPAF submission is to increase the employee's salary to $XXXX.XX as the employee has been given permanent additional duties effective 09/01/2020.

If grant funded, include in the description how this assignment is justifiable to the grant.

22 Removing Temporary Additional Duties

Example of *Brief Description:*

> This CPAF submission is to place the employee's salary back to $XXXX.XX effective 10/1/2020 as the employee is no longer working the temporary duties.

If grant-funded, include in the description how this assignment is justifiable to the grant.

23 Equity

Example of *Brief Description:*

> This CPAF submission is due to Equity increase in the employee's salary to $XXXX.XX as per SEA. Equity is effective 9/1/2020.

If grant-funded, include in the description how this assignment is justifiable to the grant.

24 Promotion

Example of *Brief Description:*

> This CPAF submission is to increase the employee's salary to $XXXXXX. Employee (Name) has been promoted effective 09/01/2020.

If grant-funded, include in the description how this assignment is justifiable to the grant.

25 Reclassification

Example of *Brief Description:*

> This CPAF submission is due to Reclassification and to increase the employee's salary to $XXXXX effective 09/01/2020.

If grant-funded, include in the description how this assignment is justifiable to the grant.