



Academic Personnel
Electronic Personnel Action Form
(EPAF)
User Guide

*FT Faculty Summer and Overload
PT Faculty
Non-teaching Graduate Assistant
And Grant Appointments*

June.23.2016

Document Title	Electronic Personnel Action Form (EPAF) User Guide
Issue Date	Revised July 28, 2015
Authors	Lynn Heller and Daniela Zurschmit, Academic Personnel John Rocco, IS Project Management
Copyright	Kent State University and Ellucian, 2014.
Get help with this process	Academic Personnel 330-672-8717
Documentation	This document and related materials are available at: http://www.kent.edu/is/training/training-materials-documentation

Table of Contents

1	The Electronic Personnel Action Form	5
1.1	Reference Information	5
	A. Position Titles:.....	5
	B. Graduate Assistant Codes	5
	C. Pay Calculations	6
	D. Calculating FTE:.....	6
1.2	Participants.....	6
2	Access the ePAF Application	7
2.1	Preparing to Enter ePAF Data.....	7
2.2	Open the ePAF Menu	8
2.3	Set Up Approval Routing Queues.....	9
2.4	Begin a New ePAF.....	11
2.5	Person Selection Screen	12
2.6	Job Selection Screen.....	14
2.7	Complete the Action Form	15
2.8	Funding Information and End of Assignment.....	16
2.9	Customize the Routing Queue (optional).....	17
2.10	Add Comments and Submit the Form.....	17
2.11	Prior to Submitting	18
3	Flexibly Scheduled Courses, All Part of Term Courses	19
4	Grant Appointments.....	20
4.1	Grant Appointment Routing Queue	20
4.2	Multiple Grants	22
4.3	Faculty Summer Grant Appointment Tips.....	23

5	Graduate Appointments.....	24
5.1	FTE Calculation Updates as of Summer 2015.....	24
5.2	University Funded Graduate Appointments	24
5.3	Federal Work Study funded Appointments	25
5.4	Graduate Appointment Tips.....	25
	A. Verify FTE Calculations.....	25
	B. Comments Field	25
	C. Work Study-Funded Appointments	25
5.5	Grant Funded Appointments	26
6	View the Originator/Approver Summary Lists	27
7	Approve an ePAF	28
7.1	Tips for Use.....	29
8	Assistance with ePAF.....	30
	Appendix I: Understanding ePAF Dates.....	31
	Appendix II: Summer FTE Maximum	32
	Full Time Faculty.....	32
	Graduate Students –NEW AS OF SUMMER 2015.....	32
	Appendix III: How to Identify a Re-Used Position Suffix	33
	Appendix IV: How to Calculate FTE	34

1 The Electronic Personnel Action Form

The ePAF is used for graduate assistant appointments, grant appointments, faculty overload appointments, and PT Faculty non-teaching appointments. It is also used for summer appointments of full-time faculty to teaching or administrative positions, including workshops.

One-time assignments, meeting certain criteria, that previously required paper **Personnel Action Form** or the paper **Change in Status/Term Assignment Renewal Form** will now be processed using the electronic **Employee Transaction Workflow (ETW)**. Information regarding the ETW may be found in FlashLine or at <http://www.kent.edu/hr/etw-user-guide>.

Note: the ePAF is no longer used to enter Part-Time Faculty Teaching appointments. These are recorded in the Faculty Load and Compensation (FLAC) system.

The appointee must have a personnel record in Banner. If you are appointing a newly-hired individual who is not found in Banner, (check PEAEMPL), contact the **Academic Personnel** office.

The information that is needed to complete an ePAF is obtained from your **business manager** and/or the **Academic Personnel** office. These items are listed in section 2.1

1.1 Reference Information

A. Position Titles:

To maintain consistency, these specific titles must be used for personnel in ePAF. Type them exactly as presented here:

Instructor (Term) Lecturer Senior Lecturer Associate Lecturer	Assistant Professor Associate Professor Professor Emeritus Professor	Grad Appointee (template auto-populates this title)	GA type codes: 41 Research (Grant) 42 Teaching 43 Administrative (Non-Teaching)
--	---	---	---

B. Graduate Assistant Codes

Academic Year

61411 Grad Teaching Assistant
61414 Grad Administrative Assistant
61416 Grad Research Assistant
61413 WS, Grad Teaching Assistant
61415 WS, Grad Administrative Assistant
61424 WS, Grad Research Assistant

Summer

61418 Summer Grad Teaching Assistant
61422 Summer Grad Administrative Assistant
61419 Summer Grad Research Assistant
61420 Summer WS Grad Teaching Assistant
61423 Summer WS, Grad Administrative Assistant
61427 Summer WS, Grad Research Assistant

C. Pay Calculations

Pay Periods always begin on the 1st or 16th of the month, and end on the 15th or 30/31st.

Tenure Track Faculty (**TTF**) summer teaching pay: 1/36 of the last regular AY salary per load hour.

TTF academic year overload: 1/24 of last regular AY salary per load hour.

TTF summer grant pay: 1/39th of last regular AY salary per load hour.

Non-Tenure Track Faculty (**NTT**) summer teaching pay: see chart in the *collective bargaining agreement*.

www.kent.edu/hr/non-tenure-track-faculty-agreement-effective-aug-16-2013

Teaching full time precludes receiving grant funds during that time.

D. Calculating FTE:

Full Time Equivalent (**FTE**) is the calculation that results in comparable workloads for other instructional sessions to those of the standard academic year. One FTE unit is comparable to one year of service to the State Teachers Retirement System (STRS).

FTE = Total teaching hours ÷ full load for the term. *An individual may not exceed total 1.0 FTE.*

	Summer Full Load	Fall or Spring Full Load	Academic Yr Full Load
TTF	12 credit hrs	12 credit hrs	24 credit hrs
<i>Always divide the TTF load hours by 12 for Spring, Summer, and Fall terms.</i>			
NTT	15 credit hrs	15 credit hrs	30 credit hrs
<i>Always divide the NTT load hours by 15 for Spring, Summer, and Fall terms.</i>			
FT Grad Assistants	20 hrs/wk	20 hrs/wk	20 hrs/wk
PT Grad Assistants	10 hrs/wk	10 hrs/wk	10 hrs/wk

1.2 Participants

ePAF Roles:

Originator: Department Secretary or designated staff person

Dept. Approver: Department Chair or Director, or designated proxy

Dean Approver: College and regional campus deans, or designate proxies

FYI Reviewer: View only

Contact the **Academic Personnel** office to request ePAF access, and notify them when the role of an individual changes.

Academic Personnel communicates with department secretaries on the DEPTSECY Outlook address list, and with those who process graduate assistants on the Grad-Contacts list. If you are not receiving periodic messages from AP regarding ePAF deadlines and updates, please contact the Academic Personnel office.

2 Access the ePAF Application

2.1 Preparing to Enter ePAF Data

To effectively utilize the ePAF Workflow, several pieces of information must be acquired from departmental sources in order to properly fund the positions and ensure accurate and timely payroll processing for faculty. This information should be collected prior to beginning the workflow process to efficiently prepare for the data entry.

The following information may be needed to complete the ePAF entry.

Employee Information:

Name
Kent State University ID
Position Number

Reason for submitting request:

Reason for Job Change
Appointment Type
Change Begin Date and End Date (if applicable)

Position Information:

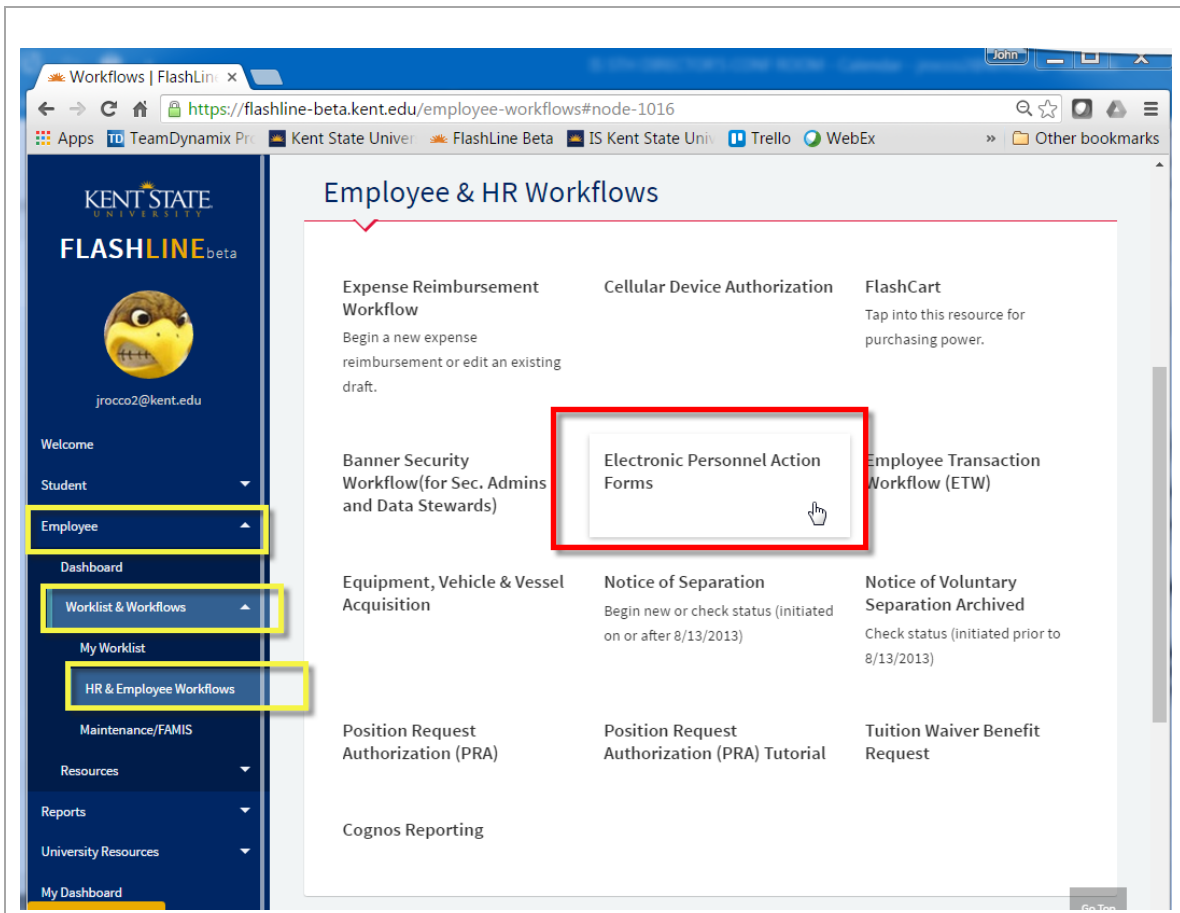
Departmental Position Number	Position Type
Position/Assignment title	Job Type
GA Type Code (if applicable)	Full-time/Part-time
Personnel Start and End Date	Organization Codes
Assignment Type	Job FTE
Hours per Week	Session (Summer I, Summer II, Fall, etc.)

Budget Information:

Index Number
Org Code
Account Number
Annual Salary/Hourly Rate
Distribution Percent
Start Date and End Date (if applicable)
Any additional funding information

This information should be available through the department Business Manager.

2.2 Open the ePAF Menu



Step Action

1. Open a web browser and go to your campus home page, or www.kent.edu
2. Type your FlashLine ID and password into the log in fields provided, click Go.
3. In the Navigation panel on the left, select **Employee** items.
4. In the **Employee** options select **Worklist & Workflow** items
5. In **Worklist & Workflow** options select **HR & Employee Workflows**.
6. Click on **Electronic Personnel Action Forms** in the options page to access the EPAF Menu.

Alternately: use the search field to find the Electronic Personnel Action Form

4. Select the name of the approving individual for each role by clicking the magnifying glass icon in column two.

User Name
<input type="text"/>

Lynn Heller is 30 Final Approver.

Patricia Groves is 32 Payroll Dept

FYI. Lynn Heller is 35 Acad Personnel Applier.

- If you do not know the name of a particular approver, ask your business manager or Academic Personnel.
- If an approver name does not appear in the list, contact Academic Personnel.
You cannot type in a name that does not appear on the list.

5. The *Self Service* screen will appear, presenting the EPAF Menu.

Approval Level	Required Action
10 - (DEPTHD) Dept Head .	Approve
20 - (DEAN) Kent Dean or	Approve
30 - (FINAPP) Final Appro	Approve
32 - (PAYROL) Payroll De	FYI
35 - (ACAPER) Academic	Apply

Your queue will look like the example below

Approval Level	User Name	Required Action
10 - (DEPTHD) Dept Head Approval	<input type="text" value="(your head)"/>	Approve
20 - (DEAN) Kent Dean or RC Approval	<input type="text" value="(your dean)"/>	Approve
30 - (FINAPP) Final Approver	<input type="text" value="LHELLER"/>	Approve
32 - (PAYROL) Payroll Dept	<input type="text" value="PGROVES"/>	FYI
35 - (ACAPER) Academic Personnel Applier	<input type="text" value="LHELLER"/>	Apply
Not Selected	<input type="text"/>	Not Selected

6. These optional roles may appear in your list or may need to be added to your queue, check with your business manager or grants coordinator.

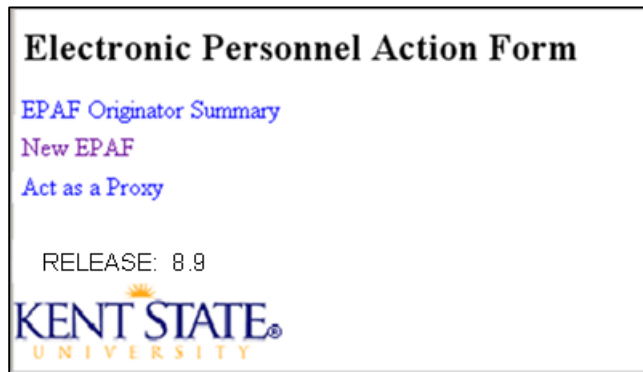
Set up the appropriate User Names and Required Action Roles.

- 3 – Principal Investigator
- 5 – Grants Approval
(used for grant assignments)
- 10 – Department Head
(used for chair/director approval at the department level)
- 15 – Review
(used for dean reviewers prior to dean’s approval)

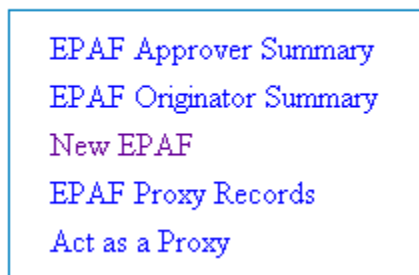
7. Click the **Save** button to order the roles by rank and save your work.

Save and Add New Rows

2.4 Begin a New ePAF



Note: Approvers see more selections:




Step	Action
-------------	---------------

- | | |
|----|---|
| 1. | EPAF approvers may view a summary of appointment forms which they either need to approve, or have already approved. |
| 2. | EPAF originators may view a summary of appointment forms which they previously originated. |
| 3. | Click New EPAF to initiate a new appointment form. |

Note: .If you are approving for someone else, click **Act as a Proxy**. Proxies must be preset. Contact Academic Personnel if you wish to designate someone to approve on your behalf.

2.6 Job Selection Screen

New EPAF Job Selection


 Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: Wilson Farr, 800190049


Query Date: Jun 01, 2007


Approval Category: Faculty PAF - Intersession, PTINTR

New Job

Position: 

Suffix:

 There are no active jobs based on the Query Date.



Step	Action
------	--------

1. Click the button “**All Jobs**” to see jobs previously held by the person. **Always click ALL JOBS, and look for additional pages of listings**

Faculty PAF - Summer 1, SUM1							
Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date
New Job							
Secondary	991179	02	Instructor (Term)	100793, Dean College of Public Health	Sep 01, 2013	Dec 31, 2013	Dec 31, 2013
Secondary	991179	03	Instructor (Term)	100793, Dean College of Public Health	Sep 01, 2013	Jan 31, 2014	Jan 31, 2014
Secondary	991179	04	Instructor (Term)	100793, Dean College of Public Health	Sep 01, 2013	Oct 31, 2013	Oct 31, 2013
Primary	991179	05	Instructor (Term)	100793, Dean College of Public Health	Dec 01, 2013	Feb 15, 2014	Feb 15, 2014
Secondary	992098	01	Instructor (Term)	100793, Dean College of Public Health	Jun 01, 2013	Aug 15, 2013	Aug 15, 2013

2. Find any jobs with the same position number that you have been provided. Note the highest suffix number displayed under any job with this position number.
3. Enter the Position Number.
4. Add **1** to the last suffix number and enter the New Suffix number in the Suffix Field.
5. Click **Go** to validate the entry and create a new EPAF.

Note: Do not re-use a position suffix from a form that has been **Cancelled** or **Voided**. Keep a list of positions and suffixes for tracking purposes.

2.9 Customize the Routing Queue (optional)

Each form displays its own routing queue, which should prefill with the approvers you set up in the default routing queue for the template used to create the form.

Customize the queue for a single form by modifying the Approval Levels, User Names and Required Actions, and **Save**. See section 2.2 for details.

Approval Level	User Name	Required Action
10 - (DEPTHD) Dept Head/Campus Dean Approv	<input type="text"/>	Approve
20 - (DEAN) Kent Dean or RC Approval	<input type="text"/>	Approve
30 - (FINAPP) Final Approver	<input type="text"/>	Approve
32 - (PAYROL) Payroll Dept	<input type="text"/>	FYI
35 - (ACAPER) Academic Personnel Applier	<input type="text"/>	Apply

2.10 Add Comments and Submit the Form

Comment

EDPF 29535 EDUCATION IN A DEMOCRATIC SOCIETY Sect 002 3 credit hours

[Approval Types](#) | [Account Distribution](#) | [Routing Queue](#) | [Transaction History](#)

[Return to Top](#)
[New EPAF](#) | [EPAF Originator Summary](#)
[Return to EPAF Menu](#)


Step	Action
------	--------

1. Type into the **Comments** field:
 - Your Phone number.
 - The Course Number, name of the course, section, # of credit hours.
 - If taught off-site, enter the name of the city, and state of the instructors' physical location while teaching, for tax purposes.
 - If GA, list funding source for tuition waiver (index) and # credit hours.
 - If GA, indicate whether the GA is opting in or out of the retirement plan.
 - Other comments and questions as desired--If you are uncertain about some element of data, explain it in the comments field.
2. Click the **Save** button. This does not submit the form for approval, but holds the form in your **Originator's Summary List**. Continue on to submit the form.

2.11 Prior to Submitting

Electronic Personnel Action Form

Your change was saved successfully.

 Enter the information for the EPAF and either Save or Submit

Name and ID:	Robert Wexer, 800320006	Job and Suffix:	998855-01, Faculty - Summer
Transaction:	81	Query Date:	Jun 01, 2007
Transaction Status:	Waiting	Last Paid Date:	
Approval Category:	Interession - Faculty PAF -, PTINTR		

After you click **Save**, the **Submit** and **Delete** buttons appear.

Options are to:

- **Save** the form and exit ePAF, and continue editing later.
- Click **Delete** to destroy the record. Note that the suffix has been used.
- **Submit** to send the Action Form to the first approver in the routing queue. You will see a notice that the form was successfully submitted.

4 Grant Appointments

4.1 Grant Appointment Routing Queue

Following is an example of a two-week summer grant appointment.

<i>Faculty PAF - Summer Grant, 992098-04 Faculty - Summer Grant</i>		
Enter Changes	Current Value	New Value
Job Begin Date:		06/01/2011
Title:		Assistant Professor
Salary:		1196.00
FTE:		.06
Timesheet Orgn:		100819
Jobs Effective Date:		06/01/2011
Personnel Date:		05/16/2011
Contract Type:		Secondary
Job Status:		Active
Job Change Reason:		00059
Employer Code:		KSU
Step:		0
Factor:		1
Pays:		1
Accrue Leave:		Yes

<i>End of Fac Summer Grant Assign, 992098-04 Faculty - Summer Grant</i>		
Enter Changes	Current Value	New Value
Jobs Effective Date:		06/15/2011
Personnel Date:		05/31/2011
Job End Date:		06/15/2011
Job Status:		Terminated
Job Change Reason:		00062

- The summer grant faculty appointment position number for faculty is 992098.
- For grant-funded graduate appointments, use the department position number.

Note: All summer grant appointments use the same category, flagged **Summer Grant**. Appointment dates should be changed to match the grant term, and the funding source codes will require updating.

- Personnel dates (beginning and end) should fall within the active grant period. If an assignment begins before the start date of the grant(s) funding the appointment, or ends after the current date of the grant(s), the appointment cannot be approved.
- Check that sufficient funds are budgeted and available in the grant(s) to fund the position. Remember to account for fringe benefits (approximately 16% for summer faculty) and indirect cost charges, as well as tuition and benefits (varies by student) for graduate assistants, if any are budgeted.
- For a grant-funded Graduate Assistant, indicate in the Comments section of the ePAF 1) that the student is at **tuition** level or **dissertation** level, and 2) whether the fees will be paid by the **department** or **grant**. Also please indicate whether the student has opted in or out of **PERS**. The appointment cannot be processed without this information.

Funding in the form of grants must be monitored by the Sponsored Programs Office. Therefore, grant appointment ePAFS will require additional Approvers to be added to the routing queue.

- Add the Principal Investigator to the routing queue (see section 2.2):
 Select *level 03* in the **Approval Level** column,
 type the person’s FlashLine **User Name**,
 and select *Approve* in the **Required Action** column.
- Add Sponsored Programs to the routing queue:
 Select *level 05* in in the **Approval Level** column,
 Select **Diana Skok, Mark Van ‘t Hooft, or Sue Tribuzzo**
 and select *Approve* in the **Required Action** column.

EPAF Default Routing Queue

✓ Your change was saved successfully.
 Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category: Summer Grant - Faculty PAF, SUMGRT

Approval Level	User Name	Required Action	Remove
3 - (PI) Principal Investigator	<input type="text"/>	Approve	<input type="checkbox"/>
5 - (GRANTS) Grants Approval	<input type="text"/>	Approve	<input type="checkbox"/>
20 - (DEAN) Kent Dean/RC Exec Dean	<input type="text"/>	Approve	<input type="checkbox"/>
30 - (FINAPP) Final Approver	<input type="text"/>	Approve	<input type="checkbox"/>
32 - (PAYROL) Payroll Dept	<input type="text"/>	FYI	<input type="checkbox"/>
35 - (ACAPER) Academic Personnel Applier	<input type="text"/>	Apply	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>

[EPAF Originator Summary](#)
[Return to EPAF Menu](#)

- For all grant-funded appointments, please add the **Principal Investigator** and **Sponsored Programs** to the approval queue. If the Principal Investigator’s name does not appear in the selection menu, please contact Academic Personnel to initiate the process of adding that individual.
- Additional Approval levels may be necessary at the discretion of either the department or Sponsored Programs.

4.2 Multiple Grants

If a position is funded from more than one grant simultaneously, you **may use one ePAF form**. In the funding section of the form, fill in the complete FOAP string for each grant source and provide the % funding drawn from each account:

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
K	100135	110118	400209	61311	1123					50.00
K	100020	110123	435101	65118	1012					50.00

See the Crosswalk tool for account lookup at <http://finacctlookup.uis.kent.edu/>

Multiple grants can be on one ePAF for one appointment period only. If multiple grants are funding an appointment and each grant spans the entire summer, it is acceptable to create an ePAF for the entire summer (e.g., 5/24/10 – 8/21/10) that specifies the percent to be paid from each grant.

If a position is funded from more than one grant sequentially by date, use a separate ePAF form for each grant period.

4.3 Faculty Summer Grant Appointment Tips

- Use 992098 as the position number for grant-funded faculty summer appointments. The suffix number should be the next in sequence from any other 992098 positions for the faculty member. (For example, if their last 992098 position suffix from last summer was 04, start with 05 for this summer.)
- Federal Cost Principles mandate that compensation for grant activity during the summer be calculated at the same rate as the academic year. Grand-funded summer salary is calculated at 1/39th (for a weekly base) or 1/9 (for a monthly base) of the previous academic year salary. Total compensation for summer teaching, dissertation advising, and/or administration, together with grant activity, cannot exceed 100% summer effort.
- In **April** of each year Sponsored Programs distributes an information sheet on summer grant appointments and an Excel template for summer salary calculations. Please contact Sponsored Programs (see below) if you have not received the materials prior to submitting your summer ePAFs.
Check that the salary to be paid for an appointment period does not exceed what the faculty member can earn for the period. Also verify that overall it does not cause them to exceed what they can earn for the entire summer (factoring in their other summer appointments.) Please contact Sponsored Programs (see below) for assistance with salary calculations.
- Anyone preparing summer grant-funded ePAFs for NTT faculty should contact Sponsored Programs for calculation assistance. NTT faculty summer grant appointments are calculated differently than the tenure track faculty summer appointments.
- Use the approval category of ‘Summer Grant – Faculty PAF’ so that Sponsored Programs staff are included in the approval Queue, and add Diana Skok, Mark Van ‘t Hooft, or Sue Tribuzzo in the Grants Approver role (scroll to far right).
- If you have questions about Grant Appointments, contact :

Diana Skok, 2-0700, dskok@kent.edu

Mark Van ‘t Hooft, 2-1630, mvanthoo@kent.edu

Sue Tribuzzo, 2-3725 stribuzz@kent.edu

5 Graduate Appointments

Graduate Assistant appointments are made for the academic year, or for a single term. There is an extra field in a Graduate Appointment template titled **Employee Group Code**, where the type of appointment (TA, RA) is specified.

<i>Grad Assistant PAF - Academic Year</i>		
Enter Changes	Current Value	New Value
Employee Group Code:	42, Teaching Assistant (TA)	41, Research Assistant (RA)
Job Begin Date:		09/01/2011
Salary:		13500.00
FTE:	0.5	1.0
Timesheet Orgn:		
Jobs Effective Date:		09/01/2011
Personnel Date:		08/21/2011
Contract Type:		Primary
Job Status:		Active
Job Change Reason:		00059
Employer Code:		KSU
Step:		0
Factor:		18
Pays:		18

Select appointment type

GA type codes:

- 41 Research
- 42 Teaching
- 43 Administrative

Change for 2015

See Appendix II

<i>End of Academic Year Grad Assistant, 998324-03 Grad Appointee</i>		
Enter Changes	Current Value	New Value
Jobs Effective Date:		05/31/2012
Personnel Date:		05/12/2012
Job End Date:		05/31/2012
Job Status:		Terminated
Job Change Reason:		00062

Check the funding section carefully:

5.1 FTE Calculation Updates as of Summer 2015

Beginning in the **Summer 2015 Term**, ***new FTE calculation factors*** will be implemented. Refer to Appendix II for changes to the Graduate Appointment FTE calculations

5.2 University Funded Graduate Appointments

A university-funded Graduate Appointment uses the department position number for GAs, which should populate the ePAF form with a *single funding line* that charges 100% of the appointment to the Department Index.

5.3 Federal Work Study funded Appointments

A work-study-funded Graduate Appointment position uses the Work Study position number, which should populate the ePAF form with **two funding lines** that charge 75% to Index 440362, and 25% to the Department Index.

If a work-study ePAF populates with only one Index line, check the position number.

If the position number is correct, contact Cindy Celaschi (2-3750) in the Budget Office.

For a Federal Work Study grant appointment, use the Fall GA template and add Judy Olabisi to the approver queue. This is most commonly used for the Fall Term, or full academic year that includes both the Fall and Spring Terms.

5.4 Graduate Appointment Tips

A. Verify FTE Calculations

Contact the Academic Personnel office by telephone or e-mail to verify the FTE calculations. Be sure the Summer 2015 updated factors are being used to compute the work hours for the graduate appointment.

B. Comments Field

Please include in the comments whether the student is receiving tuition remission and/or is at Dissertation I or II level. Indicate whether this is to be paid by the grant or another funding source.

Add a comment stating whether the GA is opting in or out of the retirement plan.

C. Work Study-Funded Appointments

Use ePAF to submit Work Study-funded appointments. **The paper work study appointment form is no longer used.**

Departments will receive from Financial Aid an *Analysis of Eligibility* form, to confirm that the appointment is funded by Work Study. **It is no longer necessary to send a copy of the Offer for Graduate Appointment to the Financial Aid Office, but a copy is required at the Academic Personnel office.**

Add **Judy Olabisi** to the Approver queue at level 31, in the FYI role (see section 2.2).

If work study funding is approved for the entire academic year, complete one ePAF with the work study position number for the entire time period, and the full salary for the year. (Funding will be split 75% to 440262 and 25% to the department, or grant if applicable.)

Graduate Appointment Tips, continued

If work study funding is approved for fall only but the appointment is for the full Academic Year, two ePAFS must be prepared; one for each semester.

1) The fall appointment under the work study position number will end 1/15/YYYY and have 9 pays and 9 factors. Funding will split 75% to index 440362 and 25% to the department, or grant if applicable.

2) The spring appointment will use the department position number and will begin 1/16/YYYY, end 5/31/YYYY with 9 pays and 9 factors charged 100% to the department.

For questions concerning Work Study funding of graduate appointments, contact Judy Olabisi in Financial aid, 2-0514, jolabisi@kent.edu

5.5 Grant Funded Appointments

Select the appropriate approval category for Grad Assistant PAF, whether fall, spring, summer, or academic year.

In the Comments field, indicate whether the student is at tuition or dissertation, if the tuition or dissertation will be paid by the grant or department. Also include whether the student has opted in or out of OPERS.

Add the Principal Investigator to the Approval Queue in the role of Approver.

Add Diana Skok , Mark Van 't Hooft or Sue Tribuzzo in the Grants Approver role.

Fellowship funding: the Department creates the Fall term ePAF and pays 8 pays and factors. Graduate Studies submits a list to the Bursar, and a 1-time lump payment is deposited to the individual's Bursar account at the beginning of Spring semester.

Contact Sponsored Programs if you have questions about grant funded appointments.

Diana Skok, 2-0700, dskok@kent.edu

Mark Van 't Hooft, 2-1630, mvanthoo@kent.edu

Sue Tribuzzo, 2-3725 stribuzz@kent.edu

6 View the Originator/Approver Summary Lists

Electronic Personnel Action Form

[EPAF Approver Summary](#)

[EPAF Originator Summary](#) 


[New EPAF](#)

[EPAF Proxy Records](#)

[Act as a Proxy](#)

EPAF Originator Summary

[Current History](#)

 Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

Transaction Status:

[New EPAF](#) | [Default Routing Queue](#) | [Search](#) | [Superuser or Filter Transactions](#)

1 - 25 of 33 [Next](#) 

EPAF Transactions

Test, Tea Administrative Clerk, 997435-00	810006839	346	PeopleAdmin Upload	Mar 15, 2007	Mar 15, 2007	Waiting	Comments Errors
Test, Terry Administrative Secretary, 997440-00	810006802	347	PeopleAdmin Upload	Mar 15, 2007	Mar 15, 2007	Waiting	Comments Errors

1 - 2 of 2

[Return to Top](#)

**Comments Exist

[New EPAF](#) | [Default Routing Queue](#) | [Search](#) | [Superuser or Filter Transactions](#)

[Return to EPAF Menu](#)

Step Action

1. From the EPAF Menu, click the link for **EPAF Originator Summary**.
2. Select **All** or **Waiting** from the Transaction Status menu, click **Go**.
3. The list of EPAFs appears.
4. Click the name link to view the complete form. Click the Comments link to view just the comments added to a form.
5. Originators may Void or Delete an EPAF even though it has been submitted to the queue.
6. If you **Save** but do not **Submit** an EPAF, the form is held in Waiting status on your **Current** tab. You may return to it later for completion and submission, or to delete it completely. Submitted forms are under the **History** tab.

7.1 Tips for Use

CANCELLING AND VOIDING FORMS

- You may cancel or void a form before it has been submitted, and after it has entered the approval chain. However, once submitted, a record of the form remains in the ePAF tool, so *the position suffix referenced on that form cannot be re-used*. Keep a list of forms you submit with position numbers and suffixes for reference.
- To cancel or void an ePAF after the transaction has been submitted for final approval, call Academic Personnel at (330) 672-8717.

CHECKING FOR EPAF FORMS TO APPROVE OR REWORK

- ePAF does not send e-mail notification, but Academic Personnel staff will send you email should they return a form to you. If an ePAF is returned for correction, note the position suffix as unused, and do a new ePAF form for the appointment.
- **Approvers** should check the ePAF Approver Summary View often to see if appointments are waiting to be approved, and **Originators** should check the ePAF Originator Summary View often to see if forms have been returned for rework, and to ensure that forms are progressing through the approver list.

Request Position Change after the ePAF has been completed

- To request a change to a grant-funded appointment or graduate work study appointment after the ePAF has been submitted and approved (process completed); submit an ***Offer of Graduate Appointment*** form to **Academic Personnel**. This form can be found on the Academic Personnel web page.
- To change any other type of appointment after the ePAF process is completed, send an ***email*** to **Academic Personnel** containing the following information:

Name and KSU ID

Position number and suffix number

Original salary, Original FTE

Revised salary, Revised FTE

- To cancel an appointment, **send an email** specifying the date on which it should be cancelled, with the above information included.

Miscellaneous Tips

- Theses/Dissertations are always Summer III.

Individuals earning a very small salary may elect to have their entire salary disbursed in the last pay period of the appointment term. (1 Factor, 1 Pay)

8 Assistance with ePAF

Any questions regarding the ePAF process or assistance with the workflow may be directed to the Academic Personnel Office at 330 672-8717.

Request ePAF access or access updates, get answers to questions, and ask to be added to the ePAF user's notification email list.

Lynn Heller	2-8702
Daniela Zurschmit	2-8701
Penny Cates	2-8718
Kristen Ramsey	2-8659
Kim Baker	2-8717

EPAF training and assisted lab sessions are provided throughout the year prior to ePAF submission deadlines for Spring, Summer, and Fall. EPAF users are notified of upcoming sessions by Academic Personnel, and may view and register for sessions at

<http://www.kent.edu/hr/register>, under Facilitator-Led events.

IS Training: istraining@kent.edu

This document and related materials are available at:

<http://www.kent.edu/is/training/documentation.cfm>

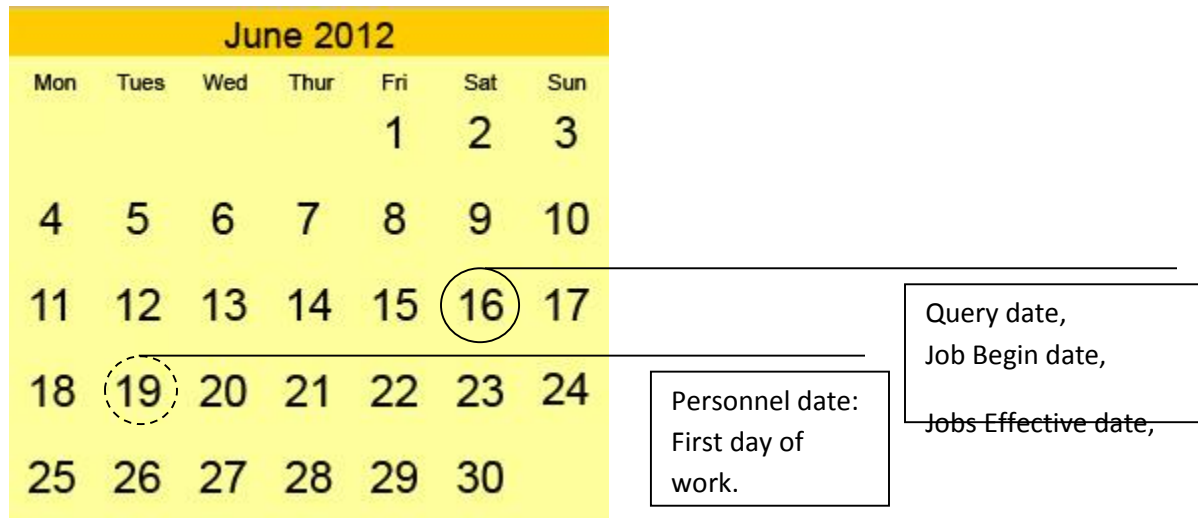
Appendix I: Understanding ePAF Dates

The ePAF describes how and when the individual is paid.

KSU Payroll periods always begin on the 1st or 16th of the month.

The **Query** date, the **Job Begin** date, and the **Jobs Effective** date should be the same as the *first day of the first pay period*, so they are always the same, either the 1st or 16th.

The *Personnel* date is the date the individual begins work. It can fall slightly before or after the first day of the first pay period.



Similarly, when ending an Assignment, the Jobs Effective date and Job End date are the *last day of the last pay period*. The personnel date is the last day the individual worked.

Date information templates are created by the Academic Personnel office and are based upon the **Query Date** entered in the **Person Selection** screen. Once the **Person Selection** and **Job Selection** data has been completed, there should be, in most instances, no need to change any of the dates in the workflow. The primary exception is in the case of *Flexibly Scheduled Courses*, where the dates may vary from the standard term dates.

Appendix II: Summer FTE Maximum

Full Time Faculty

Professor R. is a full-time (9 month) tenured faculty member, but during the summer has additional appointments. Report the individual assignments with a total FTE of 1.

Assistant to Dept. Chair from Intersession through Summer III = 1 FTE

Teach one 3-credit class during Summer I = .5 FTE

Teach one 3-credit class during Summer II = .5 FTE

Total Summer FTE can be no more than 1 FTE

(excluding intersession)

Graduate Students –NEW AS OF SUMMER 2015

Beginning Summer 2015, the factors to use when calculating FTE hours for Graduate Students will change to the following:

<u>Value</u>		<u>FTE (Full Time Equivalent)</u>
0.50	=	20 Hours Per Week
0.375	=	15 Hours Per Week
0.25	=	10 Hours Per Week

Appendix III: How to Identify a Re-Used Position Suffix

If you are new to the job of building ePAFs, you may not have a record of all previously used suffixes for a particular position. It's also possible to select a previous appointment by mistake. How do you know when this has happened?

The Last Paid Date from a Previous Appointment is displayed (it should be blank):

Faculty PAF - Summer 1, 990479-00 Instructor (Term), Last Paid Date: Dec 31, 2011

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		06/16/2012
Title: *		

The screenshot shows a form with a header line: "Faculty PAF - Summer 1, 990479-00 Instructor (Term), Last Paid Date: Dec 31, 2011". Below this is a table with three columns: "Item", "Current Value", and "New Value". The first row of the table is "Job Begin Date: MM/DD/YYYY*" with an empty "Current Value" and "06/16/2012" in the "New Value" column. The second row is "Title: *" with empty cells in both "Current Value" and "New Value" columns. Two red circles are drawn on the image: one around the "Last Paid Date: Dec 31, 2011" text in the header, and another around the "New Value" column header and the "06/16/2012" entry in the first row.

Appendix IV: How to Calculate FTE

How to Calculate the FTE for Summer Assignments

All Tenure Track summer assignments are calculated by dividing the load hours by 12.

(example: 3 load hours divided by 12 equals an FTE of .25)

All Non-Tenure Track summer assignments are calculated by dividing the load hours by 15.

(example: 3 load hours divided by 15 equals an FTE of .20)

Example for TT:

Calculate the FTE for Dissertation, Thesis, and Individual Investigation as follows:

Dissertation Direction (1/4 credit hour per dissertation); max 4

<u>Dissertation Direction</u>	<u>1 load hour</u>	<u>2 load hours</u>	<u>3 load hours</u>
1 Dissertation	0.021 FTE	0.042 FTE	0.063 FTE
2 Dissertations	0.042 FTE	0.084 FTE	0.126 FTE
3 Dissertations	0.063 FTE	0.126 FTE	0.189 FTE
4 Dissertations	0.083 FTE	0.166 FTE	0.249 FTE

*co-directing prorated

Thesis Direction (1/8 credit hour per Thesis); max 4

<u>Thesis Direction</u>	<u>1 load hour</u>	<u>2 load hours</u>	<u>3 load hours</u>
1 Thesis	0.01 FTE	0.02 FTE	0.03 FTE
2 Thesis	0.02 FTE	0.04 FTE	0.06 FTE
3 Thesis	0.03 FTE	0.06 FTE	0.09 FTE

*co-directing prorated

Individual Investigation (1/10th credit hour per student credit hour); max 4 students

	<u>1 load hour</u>	<u>2 load hours</u>	<u>3 load hours</u>	<u>4 load hours (max)</u>
Individual Investigation	0.0083 FTE	0.0166 FTE	0.0249 FTE	0.0332 FTE

(Continued on next page)

Example for NTT:

Calculate the FTE for Dissertation, Thesis, and Individual Investigation as follows:

Dissertation Direction (1/4 credit hour per dissertation); max 4

Dissertation Direction	1 load hour	2 load hours	3 load hours
1 Dissertation	0.017 FTE	0.034 FTE	0.051 FTE
2 Dissertations	0.034 FTE	0.068 FTE	0.102 FTE
3 Dissertations	0.051 FTE	0.102 FTE	0.153 FTE
4 Dissertations	0.068 FTE	0.136 FTE	0.204 FTE

*co-directing prorated

Thesis Direction (1/8 credit hour per Thesis)

Thesis Direction	1 load hour	2 load hours	3 load hours
1 Thesis	0.008 FTE	0.016 FTE	0.024 FTE
2 Thesis	0.016 FTE	0.032 FTE	0.048 FTE
3 Thesis	0.024 FTE	0.048 FTE	0.072 FTE

*co-directing prorated

Individual Investigation (1/10th credit hour per student credit hour); max 4 students

(max)	1 load hour	2 load hours	3 load hours	4 load hours
Individual Investigation	0.007 FTE	0.014 FTE	0.021 FTE	.028 FTE

All payments for tenure-track faculty members are based on 1/36 of the Academic Year salary times the load hours. Refer to information from Sponsored Programs for grant funded appointments.

All payments for non-tenure track faculty members are paid according to the chart on page 44 of the bargaining booklet, dated August 16, 2009, for Summer 2013.

How to Calculate FTE for Academic Year, Fall, or Spring Assignments

For **Tenure Track Faculty**, calculate the FTE by **dividing the load hours by 12**.

(example: 3 load hours divided by 12 equals an FTE of .25)

For **Non-Tenure Track faculty**, calculate the FTE by dividing the load hours by 15.

(example: 3 load hours divided by 15 equals an FTE of .20)