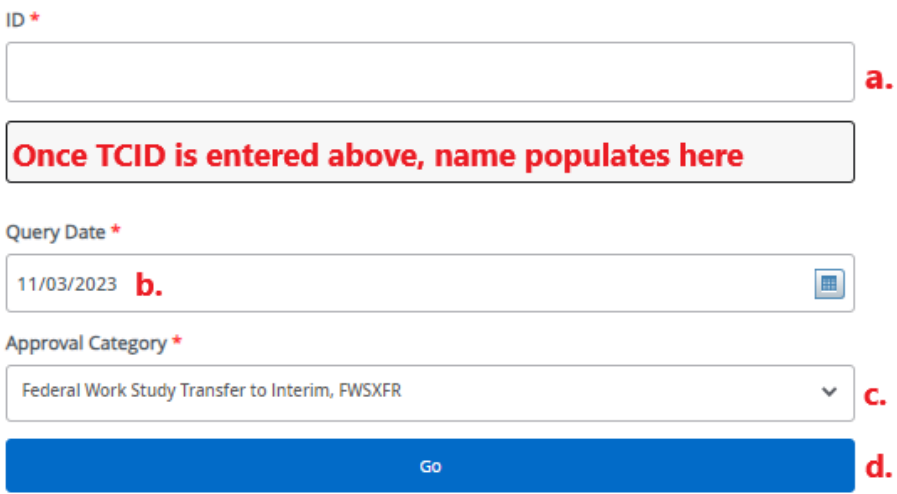
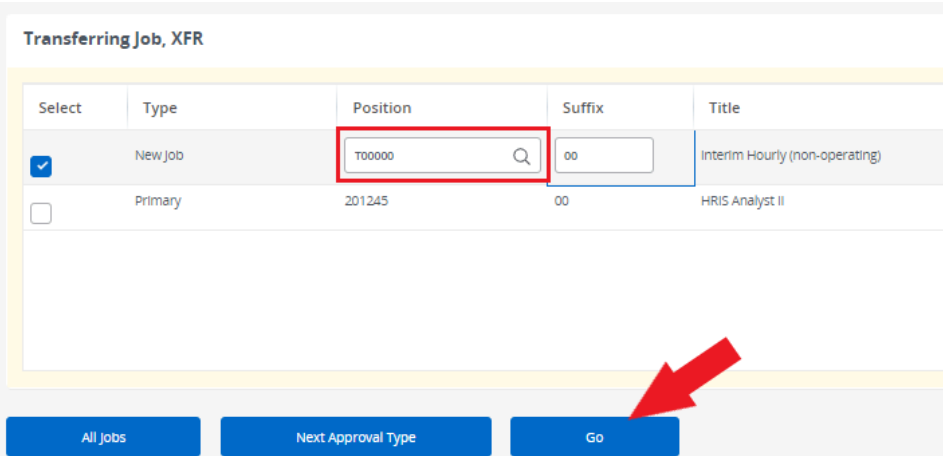


Federal Work Study Transfer to Interim Student, FWSXFR

This ePAF will transfer a Federal Work Study (FWS) to an Interim employee. This usually occurs when FWS funding runs out and the department would like to keep them on as an employee.

What you need to do	What you will see
<p>STEP 1: Provide the ePAF parameters:</p> <ol style="list-style-type: none"> Enter the TCID of the employee in the ID field ('T' in TCID in caps). Enter the Query Date. <u>The Query Date should equal the appointment effective date.</u> Select Federal Work Study Transfer to Interim, FWSXFR in the approval category. Click Go. 	
<p>STEP 2: Select Position Number</p> <p>Input the interim position number.</p> <p>For positions that are intended for student hires only, enter TS0000.</p>	

STEP 3: Input Begin Record Information.

Specify the Contract Type. Contract type is Primary if the new interim position is the only job for the employee. Otherwise, the contract type is Secondary.

The following fields will be defaulted from the query date you input in Step 1. This should be the actual start date.

Job Begin Date

Effective Date

Personnel Date

Enter the new hourly rate in the Hourly Rate field. Do not use '\$' or ''.

Enter the index from the funding source in the Timesheet Orgn field. If there are multiple indices, please select the index with the highest percentage.

Enter the Supervisor TC ID or UNI (in caps).

Transferring Job, TS0000-00 Interim Student

Contract Type *

Begin Date

Effective Date *

Personnel Date *

Hourly Rate *

Job Change Reason *

Timesheet COA *

Timesheet Orgn *

Job Location *

Supervisor TC ID/UNI *

STEP 4: Update the funding section

Ensure the funding allocation section is updated.

Enter the Index. Click the "Default from Index" button which will automatically update the Fund, Organization, and Program fields.

Re-enter the account number (The "Default from Index" button will knock it out, a known system defect with Banner).

The effective date for this section should be the same as the Job Effective Date. **Ensure the funding percent equals 100%**

Effective Date null

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
1	500000	500000	500000	6254	6000					100

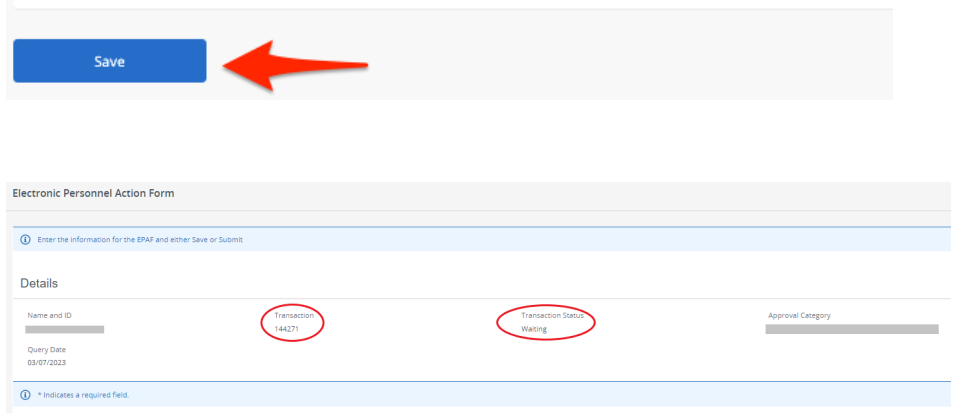
<p>STEP 5: Input End Record Information</p> <p>Enter the end date of the appointment in both Effective Date and Personnel Date.</p> <p>**Manually type in date in this field. Do NOT use the calendar picker tool</p>	<p>End Appointment, TS0000-00 Interim Student</p> <p>Job Status *</p> <p>T</p> <p>Effective Date *</p> <p>Due to defect, do not use datepicker tool. Type the date into the field.</p> <p>Personnel Date *</p> <p>Due to defect, do not use datepicker tool. Type the date into the field.</p> <p>Job Change Reason *</p> <p>EAP</p>															
<p>STEP 6: Input Routing Queue.</p> <p>Once all applicable fields have been filled out, update the routing queue. Click on the User Name drop down to enter the approver for each approval level.</p>	<p>Routing Queue</p> <table border="1"> <thead> <tr> <th>Approval Level</th> <th>User Name</th> <th>Required Action</th> </tr> </thead> <tbody> <tr> <td>5 - (DEPT-2) Academic Admin Approvals</td> <td>Not Selected</td> <td>Approve</td> </tr> <tr> <td>24 - (CONTR) Budget/Grant</td> <td></td> <td>Approve</td> </tr> <tr> <td>28 - (FINAID) Financial Aid</td> <td></td> <td>PN</td> </tr> <tr> <td>95 - (HRIS-A) HRIS Apply</td> <td></td> <td>Apply</td> </tr> </tbody> </table> <p>+ Add Row</p>	Approval Level	User Name	Required Action	5 - (DEPT-2) Academic Admin Approvals	Not Selected	Approve	24 - (CONTR) Budget/Grant		Approve	28 - (FINAID) Financial Aid		PN	95 - (HRIS-A) HRIS Apply		Apply
Approval Level	User Name	Required Action														
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24 - (CONTR) Budget/Grant		Approve														
28 - (FINAID) Financial Aid		PN														
95 - (HRIS-A) HRIS Apply		Apply														
<p>STEP 7: If needed, add a comment.</p> <p>Enter the total amount in the Comments box.</p> <p>This is a <u>Budget department requirement</u>. You may also enter other comments if needed. Click Save when done.</p>	<p>Comments</p> <p>Add comments here. See instructions left for required comments.</p> <p>Remaining Characters : 3937</p> <p>Save</p>															

STEP 8: Save the ePAF.

Click the Save button located at the bottom of the screen

*Note: Saving the ePAF is not the last step.

Once Saved, the EPAF Transaction Number and Status will appear at the top of the screen



The screenshot shows the top of the 'Electronic Personnel Action Form' interface. A blue 'Save' button is highlighted with a red arrow pointing to it from the right. Below the button, the form title 'Electronic Personnel Action Form' is visible, followed by a instruction bar: 'Enter the information for the ePAF and either Save or Submit'. A 'Details' section contains a table with the following data:

Name and ID	Transaction 144271	Transaction Status Waiting	Approval Category
Query Date 03/07/2023			

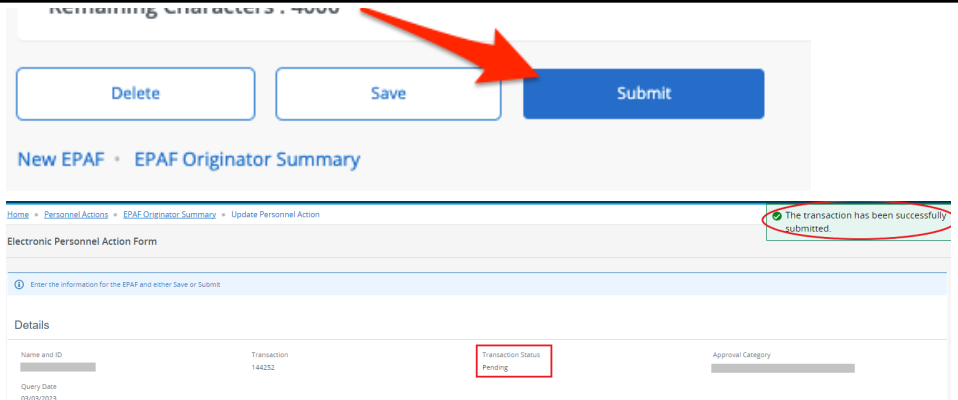
A red circle highlights the 'Transaction' and 'Transaction Status' fields. A legend at the bottom indicates that an 'i' icon indicates a required field.

STEP 8: Submit the ePAF.

After saving, additional action buttons will appear at the bottom of the ePAF. Click Submit.

Once submitted, you will receive a notification at the top right hand corner of the page.

The ePAF Transaction status will also move to **Pending**.



The screenshot shows the 'Submit' button highlighted with a red arrow. Below the buttons, the page title is 'New EPAF - EPAF Originator Summary'. A breadcrumb trail reads: 'Home > Personnel Actions > EPAF Originator Summary > Update Personnel Action'. A green notification bubble in the top right corner states: 'The transaction has been successfully submitted.' Below this, the 'Electronic Personnel Action Form' details section shows the following data:

Name and ID	Transaction 144252	Transaction Status Pending	Approval Category
Query Date 03/03/2023			

A red box highlights the 'Transaction Status' field, which now shows 'Pending'.