

### Creating an EPA Document the Right Way

| CREATE TYPE  | DOCUMENT TYPE   | RECOMMENDED OCCUPANT ACTION  | CURRENT OCCUPANT ACTION   | POSITION ACTION   |
|--|---|--|---|---|
| <b>NEW ITERATION FOR THIS PIN</b><br>(Must enter in PIN) | <b>OCCUPANT CHANGE</b><br>* Use to place new person in a vacant EXISTING PIN within current FY  | <b>NEW HIRE</b><br><b>TRANSFER IN / PROMOTE IN</b><br><b>DEMOTE IN</b><br><b>RE-HIRE</b><br><b>RETURN FROM LEAVE</b>                     | <b>ALREADY VACANT (ALWAYS)</b>  | <b>OTHER ACTION</b>   |
| <b>NEW BUDGETED OR NEW WAGE POSITION</b>                 | <b>CREATE OR REACTIVATE</b><br>* To create a BRAND NEW PIN for a newly created position, OR<br>* <b>To reactivate a PIN that did not roll forward to this FY but can be refilled within the 2 years</b> | <b>NEW HIRE</b><br><b>TRANSFER IN / PROMOTE IN</b><br><b>DEMOTE IN</b><br><b>RE-HIRE</b><br><b>RETURN FROM LEAVE</b>                     | <b>ALREADY VACANT (ALWAYS)</b>  | <b>CREATE POSITION</b><br>* New wage or budget position ( Generates a NEW PIN #) -or-<br><b>REACTIVATE POS.</b><br>* Use old pin & reestablish it in current FY. ( <b>NOTE:</b> Put Old Pin # in Box labeled PIN next to create type) |
| <b>NEW ITERATION FOR THIS PIN</b><br>(Must enter in PIN) | <b>SOURCE FUNDING CHANGE</b><br>* Change of account numbers or % between accounts   | <b>NOT APPLICABLE</b>  | <b>NOT APPLICABLE</b>   | <b>OTHER ACTION</b>   |
| <b>NET ITERATION FOR THIS PIN</b><br>(Must enter in PIN) | <b>CHANGE SAL, TITLE, PCT EFT, TERM, OR PROMOTE</b><br>(TERM.=Annual Term Months)   | <b>CHANGE SALARY, EMPLOYMENT PERIOD, PCT. EFT.</b><br><br><b>CHANGE TITLE, PROMOTE WITHIN, DEMOTE WITHIN</b><br><b>INGRADE PROMOTION</b> | <b>NOT APPLICABLE</b><br><br><b>NOT APPLICABLE</b><br><b>NOT APPLICABLE</b>   | <b>CHANGE SALARY OR PCT. EFT.</b><br><b>CHANGE TERM OF EMP.</b><br><br><b>CHANGE TITLE</b><br><b>OTHER ACTION</b><br><b>RECLASSIFICATION XXXXXXXXX</b><br>(don't use)   |
| <b>NEW ITERATION FOR THIS PIN</b><br>(Must enter in PIN) | <b>END OF TERM</b><br>* Position is originally setup for a certain period of employment ( 9, 10.5, or 12 mo) terminate at end of period. (5-31,7-15, or 8-31)<br><br>example: retire effective 8/31     | <b>END OF TERM- No Change</b>  | <b>RETIRE</b><br><b>VOLUNTARY TERM</b><br><b>INVOLUNTARY TERM</b><br><b>TRANSFER OUT</b><br><b>PROMOTE OUT</b><br><b>DEMOTE OUT</b><br><b>START LEAVE</b> | <b>END OF TERM</b><br><b>END OF TERM</b><br><b>END OF TERM</b><br><b>END OF TERM</b><br><b>END OF TERM</b><br><b>END OF TERM</b>  |
| <b>NEW ITERATION FOR THIS PIN</b><br>(Must enter in PIN) | <b>ELIMINATE POSITION</b><br>* All positions are eliminated when an employee leaves that position<br><br>* Also used for start leave  | <b>ELIMINATE POSITION</b>  | <b>RETIRE</b><br><b>VOLUNTARY TERM</b><br><b>INVOLUNTARY TERM</b><br><b>TRANSFER OUT</b><br><b>PROMOTE OUT</b><br><b>DEMOTE OUT</b><br><b>START LEAVE</b> | <b>ELIMINATE</b><br><b>ELIMINATE</b><br><b>ELIMINATE</b><br><b>ELIMINATE</b><br><b>ELIMINATE</b><br><b>ELIMINATE</b>  |
| <b>NEW ITERATION FOR THIS PIN</b>                        | <b>OTHER CHANGES</b><br>* Used when changing an ADLOC   | <b>NOT APPLICABLE</b>  | <b>ADMIN CHANGES</b>  |   |