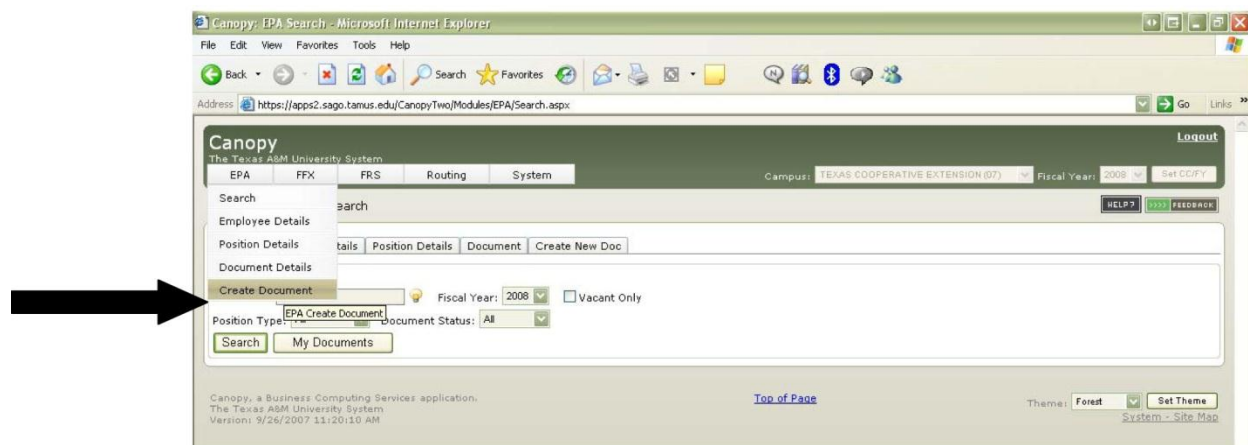


New Hires: Completing the Paperwork and Creating the EPA Document

1. Using the AG-421: New Employee Processing Checklist, have the employee complete the required paperwork. An example new hire has been attached for our example employee.
2. Ensure that all relevant paperwork has been completed before the employee leaves your office.
3. It is now time to start the EPA.



One of the easiest ways to begin an EPA documents is to use the “**Create Document Function**” on the main Canopy page.

You have two or three initial questions that must be answered before you begin the document.

- **Is this action for a Wage position or a Budgeted position?**
 - Wage positions pay an hourly rate of pay and are not eligible for benefits. Wage positions have a PIN number that consists of the TAMUS workstation code (in our case either A or X) and a randomly assigned 9-digit code, starting with an 8. (Example: A800043768)
 - Budget positions can pay a monthly or hourly rate. Budgeted positions are entitled to TAMUS benefits, provided they meet all other criteria. (Example: A02418)
- **Is this a new position, or am I taking action on an existing position?**
 - New positions are positions where the PIN has not yet been created.
 - If the position is a wage position, and the person does not yet work for TAMUS, it will also be a new position.
 - New positions will be assigned a new PIN number.
 - If the position is budgeted and vacant, you are taking action on an existing position.
- **If this is an existing position, do I know the PIN number?**
 - If not, use the search features of the system to find the correct PIN number.

Step 1 – Select the document **CREATION TYPE**:

Next to the CREATE EPA DOCUMENT button is a drop-down list of the document create types. The following illustration shows the choices in that list.



The screenshot shows the 'Canopy EPA Create Document' web application. The 'Create Type' dropdown menu is open, displaying the following options: 'New Iteration for PIN', 'New Wage Position', 'New Budgeted Position', 'Copy PIN to Next Fiscal Year', and 'Current Occur New Position - Copy Existing PIN'. The 'Fiscal Year' is set to 2009 and 'Workstation' is empty. The 'Create Document' button is visible at the bottom of the form.

New Iteration for this PIN

- Use when you have an existing position (including vacant) positions and you want to make a change to that position.
- This can include hiring someone into a vacant position, promoting someone into a vacant position, terminating someone from an active position, performing a funding change to an existing position, among other changes.
- Insure that the position you are performing the action on is currently visible.

New Wage Position

- Use this type for wage positions only.
- Use when you are hiring someone into a wage position.

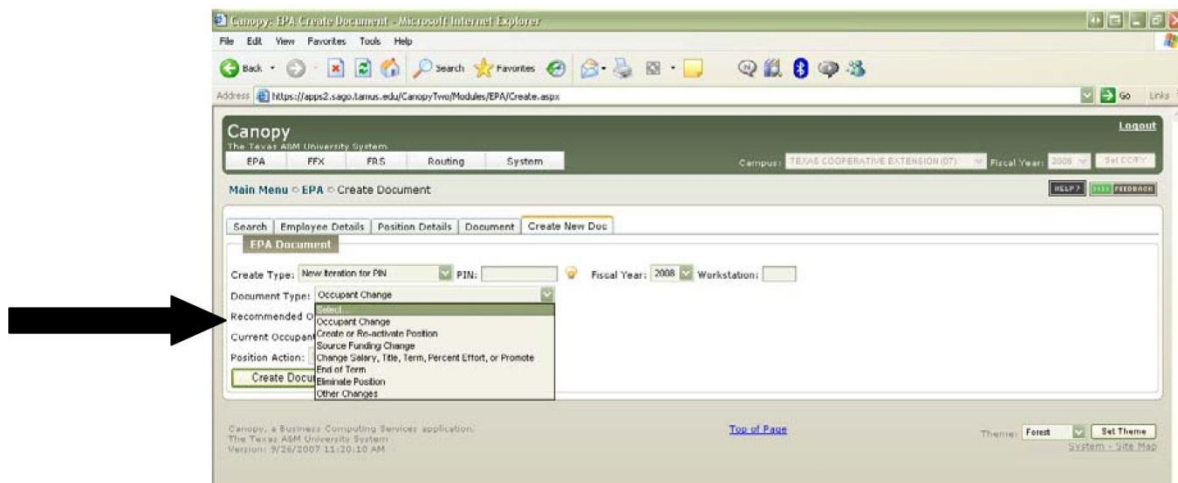
New Budgeted Position

- Use this type only for budgeted positions.
- Use when you have all appropriate authorization for the new position.
- Note – most new hires will fall into the first two actions – not this one.

Copy PIN to Next Fiscal Year

- You can use this document type when you are trying to bring a pin forward to the next fiscal year that was not done so during the budget process.

Step 2 – Select the document type, occupant and position titles:



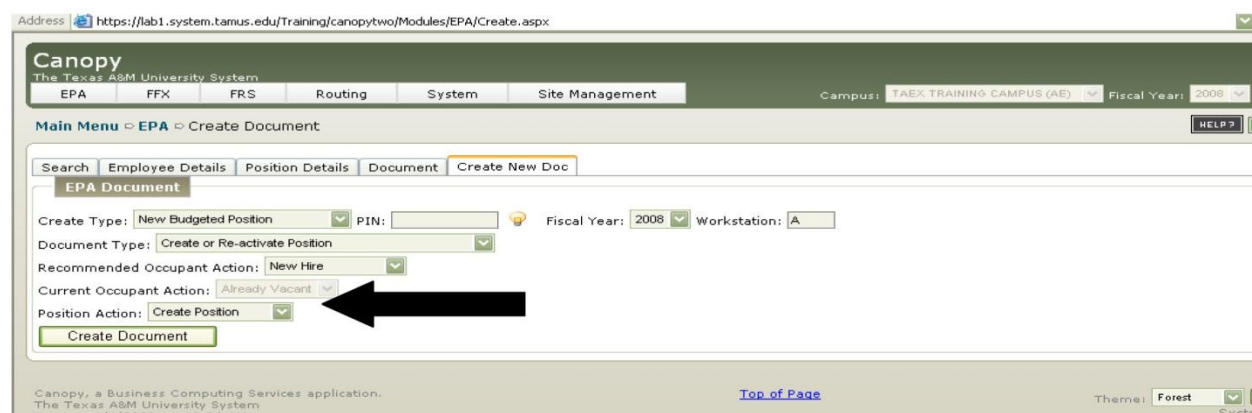
Please reference the EPA Document Type Flow Chart detail listings:

- **Document Type**
 - Occupant Change
 - Create or Reactivate
 - Source Funding Change
 - Change Salary, Title, Percent Effort, Term, or Promote
 - End of Term
 - Eliminate Position
 - Other Changes
- **Recommend Occupant Action**, actions dependent on what the Doc type is
- **Current Occupant Action**, actions dependent on previous step.
- **Position Action**, actions dependent on previous step.

Step 3 – Create the document:

After making the appropriate document action type selections, your screen should look something like the following illustration. Note – This is for a New Budgeted Position.

If you are satisfied with what you see, press the “Create Document” button.



Step 4 – Edit the document header: (example at the end of the packet)

The document header is the section of the EPA that is non-repeating (e.g. funding source lines). For the EPA document, they are:

- EPA Document Information
 - For New Hires, be sure to include education, or previous experience, short description of duties, and Supervisor.
 - New Students and Grads, include school where they are enrolled, classification, major, hours enrolled, Supervisor, short description of what they will be doing.
- Position Information (title, ADLOC, term)
- Occupant Information (employee information)
- Rate Information (salary, monthly, or biweekly)

Fill the document out. You will be required to complete the fields denoted in yellow. An example has been provided. When you are finished, press the “Save Changes” button as shown below. If everything is okay, you will get a “Record Has Been Successfully Modified” message.

EPA Document Information

EPA Document Number: 0006673 Doc FY: 2008
Routing Document Number: EBRTA0006673 Doc Status: Re-Opened
Document Type: Create or Reactivate Position (02) Date Created: 01/10/2008 10:50 AM
Action is Effective From-To: 1/1/2008 - 8/31/2008 Last Updated: 03/04/2008 11:18 AM
Dept/SubDept: Campus Dept SubDept Department Name Electronic Routing
TAES TAES TAES ADMINISTRATION Y
Source Balance
Edits Overridden:
Override Budget: ☒ RF Cost Sharing: ☐
Replace Prior Iteration(s): ☐ TEES Cost Sharing: ☐
Justification/Comments: This action is to hire Nicholas r. Stokes as Program Assistant working under the direction of Jim Brass. Nick will be assisting with project responsibilities and other duties as assigned. Nick received his BS in Agribusiness from Texas A&M University in 2002. See PAD # 029613.
Attachments: Add new attachment: (select one or type in your own)
File location: Browse...
Add Attachment

Position Information

PIN Number: A08067 (Budget) Base/New Iteration: 00/01
Administrative Location: 06110001
Title Code: 8493
Previous Title Code:
Annual Term From-To: 9/1/2007 - 8/31/2008 Annual Term Modifier: Normal-No breaks in term
Position Action: Create PIN (CR) Annual Term Months: 12.0
Assignment Dist/Cty: Temporary PIN: ☐

Occupant Information

Occupant SSN: 000123456
Occupant Name: Stokes (last name)
Nicholas (first name)
R (middle initial)
Previous Occupant SSN:
Occupant in Position From-To: 01/01/2008 -
Recommended Occupant Action: New Hire (NH)
Employee Location: 06110001
Previous Occupant Names:
Current Occupant Action: Vacant (VA)
Termination Reason: Blank/None
Check Distribution: 06110001

Rate Information

Percent Effort: 100.00 Pay Indicator: Monthly - Full Time budgeted (A)
Previous Percent Effort: Source Control: Locked Amts (L)
FTE Monthly/Hourly Rate: 2666.68 Budgeted Salary: \$32,001.00
Previous Monthly/Hourly Rate: \$0.00 Previous Budgeted Sal: \$0.00
Salary Action: Blank - none Pay Type: Normal

Save Cancel

Step 5 – Navigate to the funding sources:

Once the document header has been saved, navigate to the funding source part of the document. Do this by pressing the “Edit” link beside the source line.

Funding Source Lines										
Line	Title Code	Effective Dates	Campus - Account Object Code	Acct Analysis	Pgm Code	Pct Eft	MSO/SP Flags	Monthly Pay Bud. Salary		
1	8493 - PROGRAM ASSISTANT	09/01/2007 to 08/31/2008	TA - 120002-07020 FY08 PAYROLL SERVICES R&G 1510 Sal-Sup-Staff - Prof.	0132		50.00%	O/	\$1,333.34 \$16,001.00	Edit	Replicate Delete
2	8493 - PROGRAM ASSISTANT	09/01/2007 to 08/31/2008	TA - 122500-09800 FY08 RESEARCH GENERAL 1510 Sal-Sup-Staff - Prof.	0132		50.00%	O/	\$1,333.34 \$16,001.00	Edit	Replicate Delete

Step 6 – Edit the funding sources:

The funding links are:

- Edit – Edit this funding source line
- Replicate – Replicate (make copy) of this funding source line
- Delete – Delete this funding source

When you edit a funding source, make the necessary changes to the funding line and press the “Save” button.

Funding Source Lines										
Line	Title Code	Effective Dates	Campus - Account Object Code	Acct Analysis	Pgm Code	Pct Eft	MSO/SP Flags	Monthly Pay Bud. Salary		
1	8493	9/1/2007 8/31/2008	TA 12000207020 Sal-Sup-Staff - Prof. (1510)	0132		50.00	O /	\$1,333.34 \$16,001.00	Save Cancel	Replicate Delete
2	8493 - PROGRAM ASSISTANT	09/01/2007 to 08/31/2008	TA - 122500-09800 FY08 RESEARCH GENERAL 1510 Sal-Sup-Staff - Prof.	0132		50.00%	O/	\$1,333.34 \$16,001.00	Edit	Replicate Delete

If everything is okay, you will get a “Transaction Successful” message so you are able to continue.

Funding Source Lines Transaction Successful!										
Line	Title Code	Effective Dates	Campus - Account Object Code	Acct Analysis	Pgm Code	Pct Eft	MSO/SP Flags	Monthly Pay Bud. Salary		
1	8493 - PROGRAM ASSISTANT	09/01/2007 to 08/31/2008	TA - 120002-07020 FY08 PAYROLL SERVICES R&G 1510 Sal-Sup-Staff - Prof.	0132		50.00%	O/	\$1,333.34 \$16,001.00	Edit	Replicate Delete
2	8493 - PROGRAM ASSISTANT	09/01/2007 to 08/31/2008	TA - 122500-09800 FY08 RESEARCH GENERAL 1510 Sal-Sup-Staff - Prof.	0132		50.00%	O/	\$1,333.34 \$16,001.00	Edit	Replicate Delete

If something is wrong, you will get an error message. Possibilities include:

1. 11-digit Support Account XXXXXX XXXXX does not exist
 - Check for key errors, and make sure you are using the correct account, support account, and accounting analysis. For new accounts, make sure the account and support account are setup in FAMIS. If they are setup in FAMIS, call Payroll to make sure it is setup in BPP.

2. Insufficient Budget

- Make sure you are not overspending on an account. If you know what is causing the discrepancy, you can “Override Budget” in the header of the EPA document. This could be due to pending payroll corrections, etc.

3. Source percent efforts do not equal annual term

- Check your percent efforts on each source line so they do not exceed 100%

Step 7 – Validate the Document:

Previous Monthly/Quarterly Rate: \$0.00 Salary Action: Blank - none Previous Budgeted Sal: \$0.00 Pay Type: Normal

Change Type **Edit** **Validate** **Close**

Funding Source Lines Transaction Successful!

Line	Title Code	Effective Dates	Campus - Account Object Code	Acct Analysis	Pgm Code	Pct Eff	MSO/SP Flags	Monthly Pay Bud. Salary	Edit	Replicate
1	8493 - PROGRAM ASSISTANT	09/01/2007 to 08/31/2008	TA - 120002-07020 FY08 PAYROLL SERVICES R&G 1510 Sal-Sup-Staff - Prof.	0132		50.00%	O/	\$1,333.34 \$16,001.00	Edit	Replicate Delete
2	8493 - PROGRAM ASSISTANT	09/01/2007 to 08/31/2008	TA - 122500-09800 FY08 RESEARCH GENERAL 1510 Sal-Sup-Staff - Prof.	0132		50.00%	O/	\$1,333.34 \$16,001.00	Edit	Replicate Delete

Net Funding

You are now ready to validate the document. Validating the document cross checks the funding sources and the document header. It also looks for other problems in the document. Press the “Validate” button, as shown above. This also generates the Net Funding Source Lines.

Step 8 – Verify and edit Net funding lines (option):

If the document changes the funding requirements for any account in this fiscal year, you will see the net funding section of the document. If there are no changes, you will not see this section. You may override the requirement accounts in this section.

For AgriLife Research R&G Accounts (1XXXXX) you must change the object class code to 1700.

For AgriLife Extension E&G accounts (1XXXXX-2X000) you must change the object class code to 1600.

If you change the accounts, you must hit the “Edit” link to change, and then the “Save” link to record any changes. When you are finished, hit the “Validate” button again.

Salary Action: Blank - none Pay Type: Normal

Validate **Close**

The document was validated and net funding was generated successfully.

WATCH NET FUNDING !!

Funding Source Lines

Line	Title Code	Effective Dates	Campus - Account Object Code	Acct Analysis	Pgm Code	Pct Eff	MSO/SP Flags	Monthly Pay Bud. Salary	Edit	Replicate
1	8493 - PROGRAM ASSISTANT	09/01/2007 to 08/31/2008	TA - 120002-07020 FY08 PAYROLL SERVICES R&G 1510 Sal-Sup-Staff - Prof.	0132		50.00%	O/	\$1,333.34 \$16,001.00	Edit	Replicate Delete
2	8493 - PROGRAM ASSISTANT	09/01/2007 to 08/31/2008	TA - 122500-09800 FY08 RESEARCH GENERAL 1510 Sal-Sup-Staff - Prof.	0132		50.00%	O/	\$1,333.34 \$16,001.00	Edit	Replicate Delete

Net Funding The document was validated and net funding was generated successfully.

Line	Campus	Source Account	Rqmt/Sav. Account	Annual Net Amount	Iter Eff Date Net Amt	Future Net Amt	Past/Corr Net Amt	Edit
1	TA	120002-07020-1100 FY08 PAYROLL SERVICES R&G	120002-07020-1100 FY08 PAYROLL SERVICES R&G	\$0.00	\$10,666.72	\$10,666.72	\$0.00	Edit
			Benefits Longevity	\$0.00	\$0.00	\$0.00	\$0.00	
2	TA	122500-09800-1100 FY08 RESEARCH GENERAL	122500-09800-1100 FY08 RESEARCH GENERAL	\$16,001.00	\$10,666.72	\$10,666.72	\$0.00	Edit
			Salary Benefits Longevity	\$0.00	\$0.00	\$0.00	\$0.00	

Document Changes in Payroll

Step 9 – Closing the EPA document:

The EPA document is now ready to be closed and submitted to the approval process. Press the “Close” button.

Funding Source Lines										
Line	Title Code	Effective Dates	Campus - Account Object Code	Acct Analysis	Pgm Code	Pct Eff	MSO/SP Flags	Monthly Pay Bud. Salary		
1	8493 - PROGRAM ASSISTANT	09/01/2007 to 08/31/2008	TA - 120002-07020 FY08 PAYROLL SERVICES R&G 1510 Sal-Sup-Staff - Prof.	0132		50.00%	O/	\$1,333.34 \$16,001.00	Edit	Replicate Delete
2	8493 - PROGRAM ASSISTANT	09/01/2007 to 08/31/2008	TA - 122500-09800 FY08 RESEARCH GENERAL 1510 Sal-Sup-Staff - Prof.	0132		50.00%	O/	\$1,333.34 \$16,001.00	Edit	Replicate Delete

Net Funding									
Line	Campus	Source Account	Rqmt/Sav. Account	Type	Annual Net Amount	Iter Eff Date Net Amt	Future Net Amt	Past/Corr Net Amt	
1	TA	120002-07020-1100 FY08 PAYROLL SERVICES R&G	120002-07020-1700 FY08 PAYROLL SERVICES R&G	Salary Benefits Longevity	\$16,001.00	\$10,666.72 \$0.00 \$0.00	\$10,666.72 \$0.00 \$0.00	\$0.00	Edit
2	TA	122500-09800-1100 FY08 RESEARCH GENERAL	122500-09800-1700 FY08 RESEARCH GENERAL	Salary Benefits Longevity	\$16,001.00	\$10,666.72 \$0.00 \$0.00	\$10,666.72 \$0.00 \$0.00	\$0.00	Edit

SEE NET FUNDING CHANGE!!

Document Changes in Payroll

Once the EPA document is in the routing process, it will be assigned a routing document number so you are able to track where it is in the approval process. These routing numbers follow a common numbering system:

- They will all start with an E (for electronic)
- Followed by either a B (for budgeted employees) G (for graduate assistants) or a W (for wage employees)
- Followed by an R (for Routing)
- Followed by a campus code, in our case 06 for AgriLife Research, or 07 for AgriLife Extension Service
- Followed by the original 7-digit EPA document number

Example: EWR060286421

Clicking on the routing number will show you where the document is, in the electronic routing path.

- Cancel an EPA Document
 - Canceling the EPA voids the doc and will not send it into routing
- Recall an EPA Document
 - Allows the creator to pull back the doc from routing so you can...
- Reopen an EPA Document
 - Make changes to an EPA and then re-route it for approval