

**WEB-BASED
EMPLOYEE PAYROLL ACTION
(EPA)
MODULE**

**Version 1.2
August 2005**

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Employee Payroll Action Module (EPA)

INTRODUCTION

The EPA Module is housed under CANOPY which is the umbrella web application for Business Computing Services at The Texas A&M University System. Currently, two sub-applications are under CANOPY – the Routing & Approvals Module and the EPA Module.

The web-based Employee Payroll Action Module (EPA) has been created to provide FAMIS users with access to work with Employee Payroll Actions (formerly Form 500s). The functions include creating, modifying and canceling a document as well as inquiry into existing documents.

Your access to information within this system will be set by your FAMIS security officer. Depending on your access rights, you may view, modify, and create documents within this module.

The EPA module utilizes the FAMIS Routing & Approvals for the routing and approvals of these new payroll actions. The document forms for EPA are:

EBR for Employee Budget Request
EWR for Employee Wage Request
EGR for Employee Graduate Request

These forms are important for the correct routing of the documents. The CANOPY Routing & Approvals uses the existing structures built in the FAMIS 3270 screens to route documents.

Future year documents can be created once the BPP Prep Budget has been moved to **Active** status.

SCREEN FEATURES

There are some common features on each page of this module. This explanation may help you to understand the use of these features.

CANOPY Banner

At the top of each page you will see the following CANOPY banner:



Note the tab choices at the top of the screen.

The first tab, “**EPA (AB)**”, indicates that you are in the EPA Module and the code in parenthesis indicates the campus code you are currently logged onto.

The “**Home**” tab takes you back to the beginning screen.

And the “**Logout**” tab allows you to quit your session and logs you out of CANOPY.

Standard Symbols

Below are some of the standard symbols and their meaning.



Click on this button to expand and show more detail.



Click on this button to collapse and hide detail.



This symbol indicates that the items in the column can be sorted in:



Ascending Order



Descending Order





The double arrow buttons allow you to go back to the first





record of your search results or to the end of the data.

SCREEN FEATURES (CONT'D)


 Use the single arrows under the words “**Employee Search Results**” to advance the displayed list forward or backward.

 Expands the column to show additional information.

 Collapses (hides) the expanded detailed information.

 Collapses (opens) all sections on the screen.

 Prints the current document cover sheet.

 Recalls the current document from routing.

 Selects a new document.

LOGON TO CANOPY

Your access to CANOPY and the Modules within CANOPY is set by your FAMIS security officers. Please contact them if you have difficulty with your logon.

To log on to **CANOPY**, enter your **FAMIS ID and password**; press <ENTER>.

SAGO Business Computing Services
CANOPY
WEB ENABLED BPP/FAMIS

Logon

Please enter your FAMIS ID and password.

User ID :

Password :

[Privacy Statement](#)
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Logon to Modules

- Select your **campus code** from the drop down menu.
- Click on the **module** name (link) or the arrow button next to the module to advance to the module itself.

NOTE: ALWAYS logout when you are finished.

LOGON TO CANOPY (CONT'D)

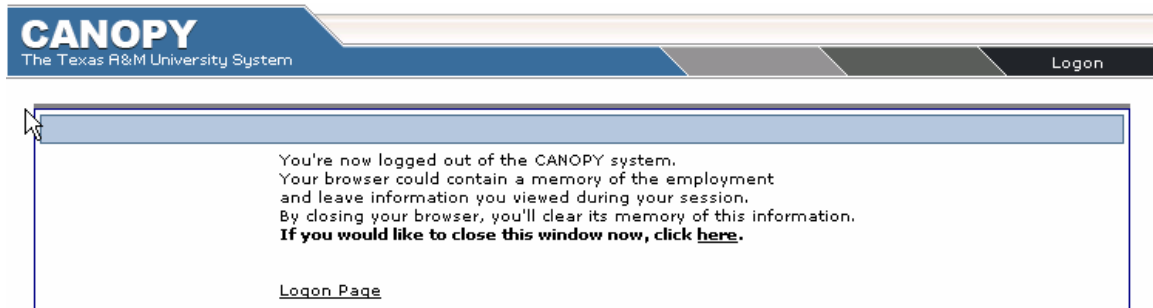
The screenshot displays the CANOPY web application interface. At the top left, the logo "CANOPY" is shown above the text "The Texas A&M University System". A navigation bar at the top right contains links for "Home (SA)", "Home", and "Logout". Below the navigation bar, a "Home" button is visible. The main content area features a "Campus Codes" dropdown menu with "SA - SAGO TRAINING CAMPUS" selected and a "Select" button. Below this is an "Applications" section with two menu items: "EMPLOYEE PAYROLL ACTION MODULE (EPA)" and "DOCUMENT ROUTING AND APPROVALS (ROUTING)". At the bottom of the page, the text "The Texas A&M University System Copyright 2004-06 All rights reserved" is displayed.

LOGOUT OF CANOPY

It is important to **always “LOGOUT”** of CANOPY.

To logout **either**:

- close the browser window
- or**
- click on the “click here” link



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MENU TABS

Search Tab -- BPP Employee Search

Search by Employee's Name

- Select "**Name (Last, First)**" from the drop down list on the left side of the page. Ensure that the "Search By:" has the **Name (Last, First)** option selected.
- Type the person's last name (or any portion of their last name). If you enter the entire last name, you may further qualify by adding the first name. (You must put a comma between the last name and the first name.) Do not enter the first name unless the entire last name is entered. Also note that the search is not case sensitive.

NOTE: Employees with last name suffixes (JR, SR, III, etc.) will appear with all other employees with the same last name and sorted in the first name order. Don't use the suffix in the name search.

- Click the **Search Budget** button to display the results.

Search by Employee's UIN or SSN

- Select "UIN/SSN" from the drop down list on the left side of the page. Ensure that the "Search By:" has the **UNI/SSN** option selected.
- Enter the employee's full UIN or SSN. Do not use dashes ("-") in the number.
- Click the **Search Budget** button to display the results.

Results

- The search results are displayed in the following example. This sample search was for all employees that have a last name of "dwarf".
- Click the **S** (Select) button to be transferred to the "Emp Display" page. This page will display additional detailed information about the employee from the BPP system. You must have proper security to use the Select button. However, student employee records can be accessed by everyone.

MENU TABS (CONT'D)

Search by Employee's Name Display

Search | Doc Search | Emp Display | PIN Display/Start EPA | EPA Doc Display | EPA Doc Update

Filters:

BPP Employee Search:

Search By: Name (Last, First)

BPP Budget (Positions) Search:

Fiscal Year: 2004 Vacant Only

Search By: Adloc, PIN (XX-XXXXXX)

PIN type: All

Employee Search Results

Select	UIN	SSN	Name	AdLoc	AdLoc Name	Position ID	Status
s	214-00-3317	*****567	Dwarf, Bashful R	02-237237	THE GOLD MNIE	M70005	Active
s	814-00-0674	*****234	Dwarf, Grumpy	02-237237	THE GOLD MNIE	M70002	Active
s	914-00-2535	*****345	Dwarf, Happy	02-237237	THE GOLD MNIE	M70003	Active
s	114-00-5480	*****456	Dwarf, Sleepy	02-237237	THE GOLD MNIE	M70004	Active

Search Tab -- BPP Budget (Positions) Search

The BPP positions budget database contains the positions that current employees hold. The search methods include:

- By Adloc – in PIN order
- By Adloc – in Occupant name order
- By UIN or SSN
- By the PIN (position) number

The search type is determined by your choice from the drop down list, shown below:

BPP Budget (Positions) Search:

Fiscal Year: 2004 Vacant Only

Search By: Adloc, PIN (XX-XXXXXX)

PIN type: Adloc, PIN (XX-XXXXXX)

Adloc, Occupant Name (XX-XXXXXX)

UIN/SSN

PIN

MENU TABS (CONT'D)

BPP Budget (Positions) Search

- Select the desired **Fiscal Year** from the drop down box.
- Click the **Vacant Only** box to only include vacant positions.
- Select the search criteria and data in the fields provided.

Search by Adloc and PIN Order

- Select **Adloc, PIN (XX-XXXXXX)** from the “Search By:” drop down list.

BPP Budget (Positions) Search:

Fiscal Year : 2004 Vacant Only

Search By : Adloc, PIN (XX-XXXXXX)

PIN type : Adloc, PIN (XX-XXXXXX)
Adloc, Occupant Name (XX-XXXXXX)
UTN/SSN
PIN

Search Budget

- Enter the Adloc in the box above the “Search Budget” button.
- Click the **Search Budget** button to display the results.

Search by Adloc and Name

- Select **Adloc, Occupant Name** from the “Search By:” drop down list.
- Enter the Adloc in the box above the “Search Budget” button. You may also include name criteria in your search. To do so, type a comma after the Adloc and type the first letters of the last name you are searching for. For example, typing “02-300200, S” will search the database for all employees in Adloc 02-300200 with a last name that begins with “S”.
- Click the **Search Budget** button to display the results.

MENU TABS (CONT'D)

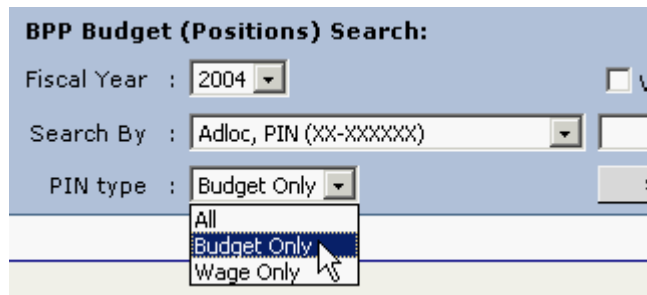
Search by UIN/SSN

- Select **UIN/SSN** from the “Search By:” drop down list.
- Enter the employee’s UIN/SSN in the box above the “Search Budget” button. Do not include any dashes (“-”).
- Click the **Search Budget** button to display the results.

Search by PIN

- Select **PIN** from the “Search By:” drop down list.
- Enter the PIN. The PIN can be a 6-character budget PIN such as “M85231” or a 10-character Wage PIN such as “M462659922”.

NOTE: To further refine your search limit the search to only budget or wage positions by selecting the **PIN type** from the drop down list, as shown below.



BPP Budget (Positions) Search:

Fiscal Year : 2004 V

Search By : Adloc, PIN (XX-XXXXXX)

PIN type : Budget Only

All
Budget Only
Wage Only

- Click the **Search Budget** button to display the results.

MENU TABS (CONT'D)

Results

- The search results are displayed below. In this example, the search is for all positions in the 02237237 Adloc.

Search | Doc Search | Emp Display | PIN Display/Start EPA | EPA Doc Display | EPA Doc Update

Filters:

BPP Employee Search:

Search By: Name (Last, First)

BPP Budget (Positions) Search:

Fiscal Year: 2004 Vacant Only

Search By: Adloc, PIN (XX-XXXXXX)

PIN type: All

Budget Search Results

Select	Name	PIN/SSN	Iter	TI Cd	Title Description	AdLoc	AdLoc Name
S	White Snow	M70001	01	9516	PRINCESS OF THE FOREST	02-237237	THE GOLD MINE
S	Dwarf Grumpy	M70002	01	4007	DWARF I	02-237237	THE GOLD MINE
S	Dwarf Happy	M70003	01	4007	DWARF I	02-237237	THE GOLD MINE
S	Dwarf Sleepy	M70004	01	4012	DWARF II	02-237237	THE GOLD MINE
S	Dwarf Bashful	M70005	01	4012	DWARF II	02-237237	THE GOLD MINE

- Click the **S** (Select) button to view detail information on the “Start EPA/PIN” page. You must have proper security to use the S button. This page will display additional information about the position in the BPP system.

MENU TABS (CONT'D)

Doc Search Tab -- [Document Search]

The screenshot displays the 'Doc Search' tab in the Employee Payroll Action Module. The interface includes a navigation bar with tabs for 'Search', 'Doc Search', 'Emp Display', 'PIN Disp/Start EPA', 'EPA Doc Display', and 'EPA Doc Update'. A 'HELP ?' button is located in the top right corner. Below the navigation bar, there is a 'Filters:' section with a sub-section titled 'EPA Document Search:'. This section contains a 'Fiscal Year' dropdown menu set to '2005', a 'Search By:' dropdown menu set to 'Name (Last, First)', and a text input field containing 'white'. Below these fields is a 'Filter By:' dropdown menu set to 'Show All' and a 'Search' button. Underneath the filters is an 'EPA Document Search Results' section. This section features a table with columns for 'Select', 'Doc ID', 'Type', 'Recommended Occupant Name', 'Current PIN', 'Current AdLoc', and 'Status'. The table contains two rows of results. The first row has a 'Select' button with the letter 'S', a 'Doc ID' of '0001664', a 'Type' of 'Create or Reactivate Position', a 'Recommended Occupant Name' of 'White, Snow', a 'Current PIN' of 'S24219 (B)', a 'Current AdLoc' of '01-220090 TEA SPEC INIT', and a 'Status' of 'In Routing'. The second row has a 'Select' button with the letter 'S', a 'Doc ID' of '0001665', a 'Type' of 'Create or Reactivate Position', a 'Recommended Occupant Name' of 'White, Snow B', a 'Current PIN' of 'A07449 (B)', a 'Current AdLoc' of '06-345001 GOLD MINE', and a 'Status' of 'Completed'. Navigation arrows are present above and below the table.

Select	Doc ID	Type	Recommended Occupant Name	Current PIN	Current AdLoc	Status
S	0001664	Create or Reactivate Position	White, Snow	S24219 (B)	01-220090 TEA SPEC INIT	In Routing
S	0001665	Create or Reactivate Position	White, Snow B	A07449 (B)	06-345001 GOLD MINE	Completed

Document Search

Two sections are displayed:

- Filters (EPA Document Search)
- EPA Document Search Results

Under the EPA Document Search Results section:

- Click the **S** button to view the EPA document details.

MENU TABS (CONT'D)

Emp Display Tab [Employee Display]

Search | Doc Search | **Emp Display** | PIN Disp/Start EPA | EPA Doc Display | EPA Doc Update | HELP ?

Employee Information

Name: Dwarf, Grumpy Birthdate: 06/10/1938
Soc Sec Number: 234-23-4234 UIN: 814-00-0674
Gender: Male Email Address:

Employment Status Information

Last Paid PIN: M70002 **Title:** 4007 DWARF I
Last Paid Date: **Tenure:** No
AdLoc: 02-237237 THE GOLD MINE **Work Phone:**
Orig Employ Date: 05/01/1988 **Current Employ Date:** 05/01/1988
Status: Active **Percent Effort:** 100.00%
Longevity Months/Flag: 184.00/Yes **Hazard Months/Flag:** 0/No
Termination Date: **Retirement Date:**
Term Months: 12.0

Employee Position History for Fiscal Year 2004

Select	PIN/SSN	TI Cd	Title Description	FY	Iter No.	AdLoc	Effective Dates
<input type="button" value="S"/>	M70002	4007	DWARF I	2004	01	02-237237	09/01/2003 - 08/31/2004

Employee Display

Three sections are displayed:

- Employee Information
- Employment Status Information
- Employee Position History for a Fiscal Year

Under the Employee Status Position section:

New fields showing the “Check Dist.” (distribution) and “Paid By: (direct deposit or check) have been added.

Under the Employee Position History section:

- Select a **Fiscal Year** from the drop down box.
- Click the **S** button to view the Rate Information and Funding Source details for the employee.

MENU TABS (CONT'D)

PIN Display/Start EPA Tab

Five sections are displayed:

- Occupant Information
- Position Information
- Rate Information
- Funding Source Lines
- Related EPA Documents

If you already have a PIN active in your session, the data for that PIN will be displayed immediately.

To view a different PIN:

- Enter the PIN in the **Selected PIN** box.
- Click the **Search / Apply** button.

To view other iterations:

By default the Canopy system will show you the most recent iteration. Iterations are sequentially numbered versions or changes to a position over the course of the fiscal year.

To view another iteration make your selection from the drop down box to the right of the Selected PIN box.

EPA documents show the Base iteration number, as well as the proposed/new iteration. The base iteration will most commonly be the previous iteration number, but in cases where iterations have been withdrawn, or the replace prior iteration flag is used, it will be the last iteration in effect prior to the effective date of this new document.

To view other years:

To view a position as it existed (or exists) in other fiscal years, select the fiscal year from the FY drop down box to the left of the “Search / Apply” button.

MENU TABS (CONT'D)

Example of PIN M70001, Iteration 01, Fiscal Year 2004

Search	Doc Search	Emp Display	PIN Disp/Start EPA	EPA Doc Display	EPA Doc Update
--------	------------	-------------	--------------------	-----------------	----------------

Selected PIN:	M70001	Iteration 01	of 1 Total	FY:	2004	Search / Apply
Create EPA Document		New Wage Position				

Occupant Information

Occupant Name: White, Snow	Occupant SSN: 123123123
From/To PIN:	Occupant Action: New Hire (NH)
Action Comments:	

Position Information

Pin Number: M70001	Iteration No: 01
Iteration Status: Suspense (S)	FLSA: Executive (exempt OT) (E)
AdLoc: 02-237237 THE GOLD MINE	Position Title Code: 9516 PRINCESS OF THE FOREST
Term Dates: 09/01/2003 - 08/31/2004	Effective Dates: 09/01/2003 - 08/31/2004
Annual Term Months: 12	Position Action: Create PIN (CR)

Rate Information

Percent Effort: 100%	Pay Indicator: Monthly - Full Time budgeted (A)
FTE Monthly Sal: \$3,000.00	Salary Action: Blank - none
Pay Type: Normal	

Funding Source Lines

Effective Dates	PT#	Account	Sup Acct	Pct Eft	Acct Analysis	Title Cd	Obj Class	Monthly Pay
09/01/2003 - 08/31/2004	02	237237		100.00%	5012	9516	1510	\$3,000.00

Under the EPA Documents for this PIN section:

- Click the **S** (Select) button to view additional EPA documents related to this PIN.

MENU TABS (CONT'D)

EPA Doc Display Tab

Six sections (and three sub-sections) are displayed:

- PA Document Information
- Position Information
- Occupant Information
- Rate Information
- Funding Source Lines
 - Routing History
 - Current Location / Approval Pending
 - Dept/Unit Routing Status

Example of EPA Document Display

Search Doc Search Emp Display PIN Disp/Start EPA EPA Doc Display EPA Doc Update								HELP ?
EPA Document Information								[Refresh]
EPA Document Number:	0000130	[Select New Doc]		Doc FY:	2004			
Routing Document Number:	EWRAM0000130			Doc Status:	Completed			
Document Type:	Create or Reactive	[Select a new EPA Doc for Viewing]		Date Created:	04/07/2004			
Action is Effective From-To:	04/07 - 08/31			Dept/Sub:	GOLD			
Source Balance edits overridden?	No			Replace prior iteration(s)?	No			
Override Budget:	No			RF Cost Sharing?	No			
Justification / Comments:	new hire eff 4/7							
Attachments:								
Position Information								
PIN Number:	M111446666 (Wage)			Proposed New Iteration:	01			
AdLoc:	02-237237 - THE GOLD MINE							
Title Code:	7561 - STUDENT WORKER I							
Previous Title Code:	-							
Annual Term From-To:	09/01 - 08/31			Annual Term Modifier:				
Position Action:	Create PIN (CR)			Annual Term Months:	12.0			
Assignment Dist/Cnty:								
Occupant Information								
Occupant SSN:	111-44-6666			Occupant Name:	DWARF, HAPPY			
Previous Occupant SSN:								
Occupant in Position From-To:	04/07/2004 -			From/To Pin:				
Recm. Occupant Action:	New Hire (NH)			Current Occupant Action:	No Occupant (wage only) (NO)			
				Termination Reason:	Blank/None			
Rate Information								
Percent Effort:	Wages			Pay Indicator:	Biweekly - Student Worker (F)			
Previous Percent Effort:	0							
FTE Monthly/Hourly rate:	Wages			Source Control:	Locked Amts (L)			
Salary Action:	Blank - none			Budgeted Salary:	\$0.00			
				Pay Type:	Normal			
Funding Source Lines								
Title Cd	Eff. Dates	CC	Source Account Object code	Acct Anly.	Pgm Cd	Pct Eff	Hourly Rate Prev Hourly Rate	
7561 STUDENT WORKER I	09/01-08/31	AM	237237-00000 - Gold Mine Designated Account 1740 - Wages-Student	5012		0.00%	\$6.00 \$0.00	

MENU TABS (CONT'D)

Example of EPA Document Display (cont'd)

<input type="checkbox"/> Routing Notes					
+ Add Route Notes					
<input type="checkbox"/> Routing Details					
<input type="checkbox"/> Routing History					
Action	Date	Name	Phone	Office	Desk
Submitted	04/07/2004 16:48	Williams, Alta J	979-845-1143		CREATE DSK
Signed	04/07/2004 16:51	Dillard, Joseph B	979-845-2711	AM-GOLD MINE	SIGNER DSK
Approved	04/07/2004 16:54	Dillard, Joseph B	979-845-2711	AM-PAYROLL	SWAT
<input type="checkbox"/> Dept/Unit Routing Status					
Department Name	Dept Code	Office	Status		
THE GOLD MINE	AM-GOLD	GOLD MINE	Routing Completed		
<input type="checkbox"/> Has Information or Notification Copy					
Date	Name	Phone	Type		
04/07/04 16:51	Williams, Alta J	979-845-1143	Ntfy/Signed		
04/07/04 16:54	Williams, Alta J	979-845-1143	Ntfy/Final		

MENU TABS (CONT'D)

EPA Doc Update Tab

Five sections are displayed:

- Document Type and Action Buttons
- Document Information
- Position Information
- Occupant Information
- Rate Information
- Funding Sources

Search | Doc Search | Emp Display | PIN Disp/Start EPA | EPA Doc Display | EPA Doc Update

Document Type and Action Buttons

Document Type	Recommended Occupant Action	Current Occupant Action	Position Action
Change Salary, Title, Term, Pct Eft, or Promote	Change Salary, Term, or Pct Eft	Not Applicable	Change Salary or

Edit Funding Sources

Document Information

EPA Document Number: 0001703 Doc FY: 2005
 Date Created: 10/21/2004 Date Last Updated: 10/21/2004
 Document Type: Change Salary, Title or Term (04) Override Source balance edits:
 Replace prior iteration(s): RF Cost Sharing:
 Action is Effective From-To: 11/01 - 08/31 Override Budget:
 Justification / Comments: Merit increase for outstanding service
 Attachments:

Position Information

PIN Number: A07449 (Budget) Proposed New Iteration: 02
 AdLoc: 06345001 Adloc Desc: GOLD MINE
 Title Code: 9516 Title Desc: PRINCESS OF THE FOREST
 Annual Term From-To: 09/01 - 08/31 Annual Term Modifier: Normal-No breaks in term
 Position Action: Other Action (OA) Annual Term Months: 12.0

Occupant Information

Occupant SSN: 333445555 Name (Last/First/MI/Sfx): WHITE SNOW B
 Occupant in Position From-To: 09/01/2004 - From/To PIN:
 Recm. Occupant Action: No Occupant change (NA) Current Occupant Action: No Occupant Change (NA)
 Termination Reason: Blank/None

Rate Information

Percent Effort: 100.00 Pay Indicator: Monthly - Full Time budgeted (A)
 Monthly FTE/Hourly Rate: 2550.00 Source Control: Normal
 Salary Action: Increase (IN) Budgeted Salary: \$30,600.00
 Pay Type: Normal

Funding Sources

<input checked="" type="checkbox"/> Done	Title Cd	Effective Dates	CC	Account	Acct Anly.	Obj Code	Pgm Cd	Pct Eff	Monthly Pay Bud Sal
<input type="checkbox"/> E <input type="checkbox"/> R <input type="checkbox"/> D	9516 PRINCESS OF FOREST	09/01 - 08/31	TA	113900-07030 GOLD MINE GRUMPY	0132	1510 Sal-Sup-Staff - Prof.		100.00%	\$2,550.00 \$30,600.00

Starting (Creating) An EPA Document

CREATING AND WORKING WITH AN EPA DOCUMENT

Preparation Steps

Step 1 – Create the Document

Set the action

Select the document type, occupant
action, and position action

Click the **Create EPA Document** button

Step 2 – Document Header

Document Information

Add Attachments

Position Information

Occupant Information

Rate Information

Save Changes

Step 3 – Funding Sources

Click Done

Step 4 – Validate

Step 5 – Net Funding

Step 6 – Close the Document

Preparation Steps

If you have questions about fields on the EPA document, check the EPA Glossary at the end of this document, or contact your agency payroll workstation.

Click the **PIN Disp/Start EPA** Tab from the Menu Tabs.

You have some initial questions to answer 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 A&M System workstation code and the person's Social Security Number (SSN). For example, if the person's SSN is 888-77-5555 and they work for TAMU, his or her pin would be M8887755555.
 - Budget Positions can pay a monthly rate or an hourly rate. Budgeted positions are entitled to TAMUS benefits, provided they meet all other criteria (Percent effort, etc.).

- **Is this a New Position or am I taking action on Existing Position?**

A few hints to make this determination:

 - 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 is a new position.
 - New budget positions will be assigned a new PIN code.
 - If the position is budgeted and vacant - you are taking an action on an existing position.

- **If this is an Existing Position - do I know the PIN number?**

If not, you can use the Search Features to find the correct PIN number.

If this is a change to an existing position, make sure the position information is displayed on the page before you proceed.

Once you have the answers to these questions, you are ready to begin.

Step 1 - Create the Document

Set the Action

Next to the Create EPA document button is a drop down list of the possible actions. The following picture shows your choices.

The screenshot shows a web interface for creating an EPA document. At the top, there are fields for 'Selected PIN: M70001', 'Iteration 01' (dropdown), 'of 1 Total', 'FY: 2004' (dropdown), and a 'Search / Apply' button. Below these is a 'Create EPA Document' button and a dropdown menu currently showing 'New Wage Position'. The dropdown menu is open, listing the following options: 'New Iteration for this PIN', 'New Wage Position' (highlighted), 'New Budgeted Position', and 'New Position - as copy of this position'. Below the dropdown, there is a section for 'Occupant Information' with the following details: 'Occupant Name: White, Snow', 'From/To PIN:', 'Action Comments:', and 'Occupant Action: New Hire (NH)'. A numerical value '3123123' is also visible next to the 'Occupant Action' field.

Following is a description of each of these actions:

New Iteration for this PIN

- Use this type for either budget or wage positions.
- Use when you have an existing position (including vacant) positions and you want to make a change to that position.
- This can include (among other things) hiring someone into a vacant position, promoting someone into a vacant position, terminating someone from an active position and performing a funding change to an existing position.
- Ensure you have the position you are performing the action on currently visible.

New Wage Position

- Use this type only for wage positions.
- 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 one of the first two actions - not this one.

New Budgeted Position - as copy of this position.

- This position is just like (New Budgeted Position) - it exists only to save you some data entry.
- Instead of starting with a blank form, the form will be filled out from data from a similar position.
- The position that is currently visible is ***the position like*** the position you are creating.

Select the document type, occupant action and position action

After making the appropriate selection above, you will see the following page: The following picture shows your choices and you choose the document type.

The screenshot shows a web application interface with a navigation bar at the top containing links: Search | Doc Search | Emp Display | PIN Disp/Start EPA | EPA Doc Display | EPA Doc Update. Below the navigation bar is a section titled "Document Type and Action Buttons". This section contains a table with four columns: Document Type, Recommended Occupant Action, Current Occupant Action, and Position Action. Each column has a dropdown menu. The "Document Type" dropdown is open, showing a list of options: --Select--, Occupant Change, Create or Reactivate Position, Source Funding Change, Change Salary, Title, or Term / Promote, End of Term, Eliminate Position, and Other Changes. A mouse cursor is pointing at "Occupant Change". To the right of the dropdowns, there is a text label "for PIN : M70001 in Fiscal Year:" followed by a dropdown menu set to "2004".

The Canopy system will walk you through the different document types. Note that the document types and position actions are different for wage and budget positions. If the actions you see do not make sense, you may have made the wrong selection in Step 1.

The drop down lists for the Recommended Occupant Action, Current Occupant Action, and Position Action are different for wage and budget positions.

Click the Create EPA Document button

The previous example shows the options for hiring a new employee into an existing vacant position.

If you are satisfied with what you see - click the **Create EPA Document** button to finalize the create step.

The screenshot shows a web application interface with a breadcrumb trail at the top: Search | Doc Search | Emp Display | PIN Display/Start EPA | EPA Doc Display | EPA Doc Update. Below this is a section titled "Document Type and Action Buttons" with a minus sign icon. It contains a table with the following data:

	Document Type	Recommended Occupant Action	Current Occupant Action	Position Action
<input type="button" value="Reset"/>	Occupant Change	New Hire	Already Vacant	Other Action

Below the table, there is a text label: "Create new iteration for PIN : M70002 in Fiscal Year: 2004" with a dropdown arrow next to the year "2004". At the bottom of this section is a "Create Document" button with a mouse cursor pointing to it.

Step 2 - Document Header

The document header is comprised of the sections of the EPA that are non-repeating – for example, the funding source lines.

- Document Information
- Position Information
- Occupant Information
- Rate Information

Document Information

Justification / Comments

The justification comments field accepts 10 lines of up to 74 characters each.

Add attachments

You may attach electronic document to the EPA document. These attachments will be stored along with the EPA document and will be viewable by anyone who has rights to view EPA document for you department. Authorized employees in the Central Payroll and business offices will also be able to view these documents.

Documents must be in **PDF format, and are currently limited to 1 megabyte).**

Position Information

Annual Term Modifier & Annual Term Months

Annual term months can be modified if the annual term modifier is “D”. For all other annual term modifiers, the Annual Term Months will be calculated and replace whatever you enter.

Occupant Information

Rate Information

Wage Positions & Percent Effort

Wage Positions do not have a percent effort as they are only paid for the hours they work.

Save Changes

When you are finished entering, don't forget to click the **Save Changes** button as shown below:

Search | Doc Search | Emp Display | PIN Disp/Start EPA | EPA Doc Display | EPA Doc Update

Document Type and Action Buttons

Document Type	Recommended Occupant Action	Current Occupant Action	Position Action
Occupant Change	Make Vacant	Retire	Other Action

Document Information

EPA Document Number: 0000386 Doc FY: 2004
 Date Created: 02/16/2004 Date Last Updated: 02/16/2004
 Document Type: Occupant Change (01) Override Outbalances:
 Justification / Comments: This action hires snow white

Position Information

PIN Number: M70001 (Budget) Position Action: Other Action (OA)
 AdLoc: 02237237 Adloc Desc: THE GOLD MINE
 Title Code: 9516 Title Desc: PRINCESS OF THE FOREST
 Effective From-To: 12/01 08/31 Term From-To: 09/01 08/31 None
 Annl. Term Months: 12.0

Occupant Information

Occupant SSN: 99999999 Name(Last/First/MI/5fx): VACANT
 Effective From-To: 09/01/2003 08/31/2004 From/To PIN: /
 Recm. Occupant Action: Vacant (VA) Current Occupant Action: Retire (RE)

Rate Information

Percent Effort: 100.00 Pay Indicator: Monthly - Full Time budgeted (A)
 Range/Step Code: Source Control: Normal
 Monthly FTE/Hourly Rate: 2800.00 Budgeted Salary: \$33,600.00
 Salary Action: N/A - No Salary Change (NA) Pay Type: Normal

Funding Sources

Step 3 - Funding Sources

Edit funding source lines

Once the document header has been saved, navigate to the funding source part of the document. Click the **Edit Funding Sources** button.

Document Type and Action Buttons

Document Type	Recommended Occupant Action	Current Occupant Action	Position Action
Occupant Change	Make Vacant	Retire	Other Action

Buttons: Edit Funding Sources, Save Changes, Validate, Cancel

The funding buttons are:

- **E** - Edit this funding source line
- **R** - Replicate (make copy) of this funding source line
- **D** - Delete this funding source line

Search | Doc Search | Emp Display | PIN Disp/Start EPA | EPA Doc Display | EPA Doc Update

EPA Doc 0000386 updated successfully.

+ Document Type and Action Buttons

+ Document Information

+ Position Information

+ Occupant Information

+ Rate Information

- **Funding Sources**

<input checked="" type="checkbox"/> Done	Title Cd	Effective Dates	CC	Account	Acct Anly.	Obj Code	Pgm Cd	Pct Eff	Monthly Pay Bud Sal
<input type="checkbox"/> E <input type="checkbox"/> R <input type="checkbox"/> D	9516 PRINCESS	09/01 - 08/31	AB	237237-00000 THE GOLD MINE ACCOUNT	5012	1510 Sal-Sup-Staff - Prof.		100.00%	\$2,800.00 \$33,600.00

Make the necessary changes to the funding line(s) and click the **Save** button.

A check box is provided to allow you to specify if funds used on a document are being cost-shared against a TEES project. This box is an information only box, but it will send a copy of the document to the TEES financial system for documentation.

Step 3 - Funding Sources (cont'd)

Funding Sources											
Done	Title Cd	Effective Dates	CC	Account	Acct Anly.	Obj Code	Pgm Cd	Pct Eff	Monthly Pay	Mgmt/Support Cds	
Save	9516	09/01	AB	237237 00000	5012	Sal-Sup-Staff - Prof. (1510)		100.00	\$3,000.00	S	
Cancel		08/31									

When you have finished with your changes to the funding source(s), click the **Done** button.

Step 4 - Validate the Document

You are now ready to validate the document. Validating the document “crosschecks” the information on the document header and the funding source section.

Click the **Validate** button.

Search | Doc Search | Emp Display | PIN Disp/Start EPA | EPA Doc Display | EPA Doc Update

Document Type and Action Buttons

Document Type	Recommended Occupant Action	Current Occupant Action	Position Action
Occupant Change	Make Vacant	Retire	Other Action

- + Document Information
- + Position Information
- + Occupant Information
- + Rate Information
- + Funding Sources

Step 5 - Net Funding

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 change the requirement accounts as necessary. If you change the accounts, click the **Save Net Funding** button.

The Net Funding display includes calculations for benefits and longevity.

Net Funding edits stop documents from being processed if sufficient budget is not available. There is a field in the Document Information section of the Document Header that can be used to override the budget.

When you are finished, click the **Done** button.

	Source Account	Rqmt/Sav Account	Obj	Type	Annual Net Amt	Iter Eff Date Net Amt	Future Net Amt	Past/Corr Net Amt
TA	113900 07030 1100 Gold Mine Grumpy	113900 07030 Gold Mine Grumpy	1100	Salary Benefits Longevity	\$600.00	\$500.00 \$0.00 \$0.00	\$500.00 \$0.00 \$0.00	\$0.00



If change is positive, the Rqmt/Sav Account field displays the source account, but this account can be overwritten by another account of your choice.

If the change is negative, the Rqmt/Sav Account field is protected and displays the account on FAMIS Screen 8. If the field on FAMIS Screen 8 is blank, then the source account is displayed. To make a change to this account, you must do a Budget Transfer.

Step 6 - Close the Document

The document is now ready to be closed and submitted to Routing & Approvals. The encumbrances post to FAMIS when the EPA document is closed.

Click the **Close** button.

Document Type	Recommended Occupant Action	Current Occupant Action	Position Action
Occupant Change	Make Vacant	Retire	Other Action

Buttons:

Expandable sections:

- Edit Funding Sources
- + Document Information
- + Position Information
- + Occupant Information
- + Rate Information
- + Funding Sources
- + Net Funding Amounts

Cancel or Withdraw An EPA Document

Cancel an EPA Document

An EPA document can be canceled at any time during the process, provided the document has not been submitted.

Navigate to the “Document Type and Actions” section and click the **Cancel** button.

The screenshot shows a web interface titled "Document Type and Action Buttons". It features a table with the following columns: Document Type, Recommended Occupant Action, Current Occupant Action, and Position Action. The table contains one row with the values: Occupant Change, Make Vacant, Retire, and Other Action. Below the table, there are several buttons: "Reset", "Save Changes", "Cancel", and "Close". The "Cancel" button is highlighted with a mouse cursor. To the left of the table, there is a sidebar with a list of expandable sections: "Edit Funding Sources" (checked), "Document Information", "Position Information", "Occupant Information", "Rate Information", "Funding Sources", and "Net Funding Amounts".

	Document Type	Recommended Occupant Action	Current Occupant Action	Position Action
Reset	Occupant Change	Make Vacant	Retire	Other Action

Buttons: Edit Funding Sources, Save Changes, Cancel, Close

- + Document Information
- + Position Information
- + Occupant Information
- + Rate Information
- + Funding Sources
- + Net Funding Amounts

Withdraw an EPA Document and Iterations

Authorized users in the payroll office will now see a button on the “EPA Doc Display” page that allows them to withdraw the EPA document.

This action will change the status of the EPA document to “Withdrawn” and also withdraw the iteration from the position in BPP. The iteration prior to the iteration being withdrawn will now become the currently active iteration.

To be given rights to see (and use) the **Withdraw Document** button, you must have FAMIS entity update rights to all documents for your institution, and also must be currently assigned to a final approval desk in the routing path for the payroll office.

It is recommended that this feature be used by the payroll office for all iterations created by the EPA documents.

Printing EPA Documents

Printing an EPA document

Click the print symbol (located to the right of the “Select New Doc” button) to bring up a “printer friendly” page for printing a copy of the document to your local printer.



For printing the current document cover sheet.

If you experience problems printing an EPA document, you may need to make some adjustments to your settings.

Using Internet Explorer, go to FILE, PAGE SETUP.

Set your margins to .25 for both the right and left margins and .5 for your top and bottom margins.

If you still have problems, you can switch the layout of the page to LANDSCAPE.

Routing EPA Documents

EPA documents route through FAMIS Routing & Approvals. This is the same functionality currently used for the routing of Purchasing documents in FAMIS. EPA documents route through the Routing & Approvals of any TAMUS Member using FAMIS who is impacted by the funding entered on the document.

Discarded notification and FYI actions will not appear by default in your outbox. You may see the discarded items by checking the "Include Discards" box.

CANOPY
The Texas R&M University System

Routing (02) Home Logout

InBox | OutBox | Document | Profile

Filters:

Start Date: 07/19/2005 End Date: 08/19/2005

Include Finished: Discards:

Document: [] Substitute For: My Outbox [S] []

Apply Filter Found 1 Documents.

Details:

Doc Number	Current Status	Action Taken	Action Date	Notes	Summary	Expand
PLP01L010014	Final	Discarded	8/19/2005 1:52:00 PM		REGISTRATION - NASACT/AGA GASB	

Page 1 of 1

Department Routing

The EPA document routes through

- The department of the Adloc of the current position as displayed on the Adloc Table (Screen 306) in BPP.
- The department for each of the Funding Source Accounts
- The department for each of the Requirement Accounts

Executive Level Routing

The EPA document routes through any Executive Level routing required by the department.

Processing Level Routing

The EPA document chooses its Processing Office path based on:

- the form (EBR, EWR, EGR)
- based on Monthly or Biweekly payroll flag (field) stored in BPP
- based on Adloc Screen 306 in BPP where the path name is stored in a field

The EPA document must be given the **final approval** in the Processing Office for the Budget Action to post in BPP.

Security & Access Notes

EPA Documents

Your access to information is set by your FAMIS security officer. Depending on your access rights, you may view, modify, and create documents within this module.

Access to EPA on the Web

Entrance to EPA from Home Page

- Must have EPA entity (EPDOC or E***) in FAMIS security

EPA Employee Search

- Access to a person's record from employee search is based on a match between the user's entity security and the adloc/dept of the person they are trying to select.

EPA Position Search

- Access to the record for a position from the position search is based on a match between the user's entity security and the adloc/dept of the position they are trying to access.

Changes to an EPA document

Budgeted PINs

A person must be granted security rights to create or change documents for an Adloc.

Wage Position

Any department can add sources or drop sources for a Wage PIN. This accommodates the movement of wage employees between Adlocs.

For wage PINs, any person with access to any Adloc in the Workstation of the Wage Position can initiate a change source of funds for a Wage PIN. For example,

Wage PIN M462012222 (John Doe) is Adloc'd to the Library

John Doe takes an evening position with Athletic Department.

The Athletic Department can initiate a change source of funds action on this existing Wage Position.

They cannot, however, view the pay rate on the Library source.

EPA Screens & Entity Control

New Screens

- 755 Summary by PIN -- Display only
- 756 Detail by PIN – Display only
- 757 Summary by SL – Display only
- 758 Detail by SL – Display only

- 753 Budgeted Position Encumbrance Adjustment
- 754 Wage Position Encumbrance Adjustment

Existing Screens

- 770 By Person
- 771 By Account
- 772 Detail Voucher
- 773 By Cycle
- 779 Detail Person Record

Entity Control

EPDOC

Web entry

EPHIST

Inquiry for 755-758 & 770's

EPENC

Update for 753/754

E*****

All entry and inquiry

Glossary

Annual Term

This defines the period of time this position will be on the payroll and is found in the Position section of the Document Header.

For typical full-time budgeted positions, these dates are always 9/1/yy through 8/31/yy.

For Teaching and Graduate assistant positions, the term is often different. The person may be employed just for the fall semester (9/1 - 12/31) or just the spring semester (1/15 - 5/31). Any term is valid - provided the term is specified in 1/2 month increments.

Annual Term Modifier

Sometimes the annual term is not continuous. For example, the Term may be from 9/1 to 8/31, but with a break for the first summer session.

If this is the case, the Annual Term modifier is used. See the drop down list in the Position section of the Document Header for the options for the term modifier.

Iteration

The BPP system is organized by Position. However, positions and the people in the positions change over the course of the year.

Each change to the BPP Position database is called an **iteration**. The first version of the position at the start of the fiscal year is iteration **01**. Iterations increment by one over the course of the year.

Funding Source Lines

In the BPP system, how positions are funded is specified in advance.

The funding source lines specify how positions are funded. They specify the account and that will pay the salary and the object code that will be charged on the account.

