

EPAF – How to Originate a Part-time Job Transfer (TRAN40)

The following steps will guide you step-by-step to originate a job transfer EPAF for a part-time employee (TRAN40) into a position they have **never** worked in. **If you are transferring an employee into a job that they have held in the past, you MUST use a different EPAF.** Please see FAQs on the Human Resources EPAF Process webpage.

1. Click on **New EPAF**.

Electronic Personnel Action Form

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2. To transfer the employee, select **TRAN40**.

New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. S

* - indicates a required field.

ID: *

Query Date: MM/DD/YYYY*

Approval Category: *

- Job Transfer - Part-Time Non-Teaching Staff, TRAN40
- Reappoint Full-Time Contractor Non-Paid, RAPT60
- Reappoint Student Federal Work Study, RAPT90
- Reappoint Student Texas Work Study, RAPT91
- Job Transfer - Full-Time Staff - Contract Exempt, TRAN10
- Job Transfer - Full-Time Staff - Contract Exempt Grant, TRAN11
- Job Transfer - Full-Time Staff - Non-Contract Exempt, TRAN15
- Job Transfer - Full-Time Staff - Non-Contract Exempt Grant, TRAN16
- Job Transfer - Full Time Staff - Non-Contract Non-Exempt, TRAN20
- Job Transfer - Full-Time Staff - Non-Contract Non-Exempt Gra, TRAN21
- Job Transfer - Part-Time Non-Teaching Staff, TRAN40**
- Job Transfer - Full-Time Faculty - 9 Month, TRAN30
- Job Transfer - Full-Time Faculty Grant - 9 Month, TRAN31
- Job Transfer - Full-Time Faculty Temporary - 9 Month, TRAN32
- Job Transfer - Full-Time Faculty - 10.5 Month, TRAN33
- Job Transfer - Full-Time Faculty Grant - 10.5 Month, TRAN34
- Job Transfer - Full-Time Faculty Temporary - 10.5 Month, TRAN35
- Job Transfer - Full-Time Faculty - 12 Month, TRAN36
- Job Transfer - Full-Time Faculty Grant - 12 Month, TRAN37
- Job Transfer - Full-Time Faculty Temporary - 12 Month, TRAN38
- Terminate Job and Employment, TERM10

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- The system will display open job(s) – primary. If there are no active jobs, you cannot transfer this employee. Click **Go**.

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New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

* - indicates a required field.

ID: *

Query Date: MM/DD/YYYY*

Approval Category: *

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	PT2050	00	PT Administrative Assistant	52050, Counseling/Advising	Nov 14, 2013			Active

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- If this employee is being transferred to a different address, select the radio button for **New Record**.
If this employee is staying at the same address, select the active address shown. Once the correct selection has been made, select **Next Approval Type**.

Public San Jacinto Address Information

Type	From and To Date	Address	Status	Select
New Record				<input type="radio"/>
San Jacinto College Address	Dec 15, 2014 to Current Date	8060 Spencer Highway C-11.1077 C-11 Pasadena, Texas 77505	Active	<input checked="" type="radio"/>

Address Type defaulted from Electronic Approval Category Form (NTRACAT).

- If this employee is being transferred to a different phone number, select the radio button for **New Record**. If this employee is staying at the same phone number, select the active address shown. Once the correct selection has been made select **Next Approval Type**.

Telephone Selection

 To add a new record, choose New Record. Or, choose the record to be updated under Select.

ID: Will Smith, G00879817
Query Date: Jan 14, 2014
Approval Category: Tran PT Staff, TRAN40

San Jacinto Telephone Information

Type	Telephone	Status	Address Type	Select
New Record				<input checked="" type="radio"/>
College Work Telephone	281-9986150 1234	Active		<input type="radio"/>

 Telephone Type defaulted from Electronic Approval Category Form (NTRACAT).

- Follow the same actions as above for the Billing address and then the Billing phone number.

Address Selection

 To add a new record, choose New Record. Or, choose the record to be updated under Select.

ID: Will Smith, G00879817
Query Date: Jan 14, 2014
Approval Category: Tran PT Staff, TRAN40

Billing Address Information

Type	From and To Date	Address	Status	Select
New Record				<input checked="" type="radio"/>
Billing	Jan 14, 2014 to Current Date	8060 Spencer Highway 123 C1 Pasadena, Texas 77505	Active	<input type="radio"/>

 Address Type defaulted from Electronic Approval Category Form (NTRACAT).

7. Once you have made the correct selection, click **Go**.

Telephone Selection

To add a new record, choose New Record. Or, choose the record to be updated under Select.

ID: Will Smith, G00879817
Query Date: Jan 14, 2014
Approval Category: Tran PT Staff, TRAN40

Billing Telephone Information

Type	Telephone	Status	Address Type	Select
New Record				<input type="radio"/>
Billing	281-9986150 1234	Active		<input type="radio"/>

✓ Telephone Type defaulted from Electronic Approval Category Form (NTRACAT).

Show All Phones

Go

8. Select the job that you wish to **terminate**. You **MUST** terminate the job that the employee is leaving. Click **Next Approval Type**.

New EPAF Job Selection

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

ID: Will Smith, G00879817
Query Date: Jan 14, 2014
Approval Category: Tran PT Staff, TRAN40

Terminate Existing Job Assignment JOBS90

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job									<input type="radio"/>
	Primary	PT2050	00	PT Administrative Assistant	52050, Counseling/Advising	Nov 14, 2013			Active	<input checked="" type="radio"/>

All Jobs

Next Approval Type Go

9. Enter the POSN for the **new job** that the employee is being transferred into. Click **Go**.

New EPAF Job Selection

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

ID: Will Smith, G00879817
Query Date: Jan 14, 2014
Approval Category: Tran PT Staff, TRAN40

Create Job Assignment - Hourly Staff JOBS12

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job	WF2050	00	FWS, Counseling/Advising	52050, Counseling/Advising					<input checked="" type="radio"/>
	Primary	PT2050	00	PT Administrative Assistant	52050, Counseling/Advising	Nov 14, 2013			Active	<input type="radio"/>

All Jobs

Next Approval Type Go

10. If you selected a new San Jacinto address and/or phone number for the transferring employee, you will need to enter a new San Jacinto address and/or phone number for your employee.

If you selected to keep the existing address and/or phone number, you do not have to enter another address and/or phone number. (This example is keeping the existing address and phone number.)

Public San Jacinto Address Information		
Item	Current Value	New Value
Address Type: (Not Enterable)	SJ, San Jacinto College Address	<input type="text" value="SJ"/>
Address Sequence No.:	9	<input type="text" value="9"/>
Address From Date: MM/DD/YYYY	12/15/2014	<input type="text" value="03/30/2015"/>
Address Line 1:	8060 Spencer Highway	<input type="text"/>
Address Line 2:	C-11.1077	<input type="text"/>
Address Line 3:	C-11	<input type="text"/>
City:	Pasadena	<input type="text"/>
State:	TX, Texas	<input type="text" value="TX, Texas"/>
ZIP or Postal Code:	77505	<input type="text" value="77505"/>

Public San Jacinto Telephone Information		
Item	Current Value	New Value
Telephone Type: (Not Enterable)	SJ, College Work Telephone	<input type="text" value="SJ"/>
Telephone Seq. No.:	15	<input type="text" value="15"/>
Area Code:	281	<input type="text"/>
Telephone Number:	9986150	<input type="text"/>
Phone Extension No.:	1490	<input type="text"/>

11. If you selected a new Billing address and/or phone number for the transferring employee, you will need to enter a new Billing address and/or phone number for your employee. (This example shows a new address being entered.)

Billing Address Information		
Item	Current Value	New Value
Address Type: (Not Enterable)		<input type="text" value="BI"/>
Address Sequence No.: (Not Enterable)		<input type="text"/>
Address From Date: MM/DD/YYYY		<input type="text" value="04/10/2014"/>
Address Line 1:		<input type="text" value="8060 Spencer Highway"/>
Address Line 2:		<input type="text" value="C-11.1077"/>
Address Line 3:		<input type="text" value="C-11"/>
City:		<input type="text" value="Pasadena"/>
State:		<input type="text" value="TX, Texas"/>
ZIP or Postal Code:		<input type="text" value="77505"/>

Billing Telephone Information		
Item	Current Value	New Value
Telephone Type: (Not Enterable)		<input type="text" value="BI"/>
Telephone Seq. No.: (Not Enterable)		<input type="text"/>
Area Code:		<input type="text" value="281"/>
Telephone Number:		<input type="text" value="9986150"/>
Phone Extension No.:		<input type="text" value="1490"/>

12. To transfer an employee, you must first terminate the employee's old job.

The job effective date for the termination MUST be the day before the effective date of the new job.

Terminate Existing Job Assignment, PT2050-00 PT Administrative Assistant		
Item	Current Value	New Value
Job Effective Date: MM/DD/YYYY*	11/14/2013	01/13/2014
Personnel Date: MM/DD/YYYY	11/14/2013	
Job Status: *(Not Enterable)	Active	T
Job Change Reason: *	NEW	POSCG, Changed Positions
Contract Begin Date: MM/DD/YYYY(Not Enterable)		
Contract End Date: MM/DD/YYYY(Not Enterable)		

13. Update the **Home Organization** and **Distribution Orgn** with the ORG that the employee is transferring into.

Update Home & Distribution Organization Codes		
Item	Current Value	New Value
Home Organization: * 52050, Counseling/Advising		52050
Distribution Orgn: * 52050, Counseling/Advising		52050

14. Enter the title, regular rate, leader ID, leader position, and leader suffix for the new job.

- a. Title will default in as PT Administrative Assistant I. If that is the correct title, the title line can be left blank. If that is not the correct title, the correct Board approved title must be entered on the title line.
All part-time titles = PT + the Board approved title

Create Job Assignment - Hourly Staff, WF2050-00 FWS, Counseling/Advising		
Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		01/14/2014
Contract Type: *		Primary
Job Effective Date: MM/DD/YYYY*		01/14/2014
Personnel Date: MM/DD/YYYY		
Title:		
Step: *(Not Enterable)		0
Regular Rate: *		7.25
Job Change Reason: *(Not Enterable)		NEW
Payroll ID:		Not Selected
Timesheet Orgn:		
Leader ID: *		G001234567
Leader Position: *		A12345
Leader Suffix: *		00

15. The labor distribution (FOAP) should not need to be changed. Please contact Human Resources if you feel that the FOAP on the EPAF is wrong before you change anything on the labor distribution.

Update Job Labor Distribution, WF2050-00 FWS, Counseling/Advising

Current
 Effective Date: 01/14/2014
 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New
 Effective Date: MM/DD/YYYY 01/14/2014

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
j		217126	52050	615101	520500					100.00			
Total:										100.00			

✓

Default from Index Save and Add New Rows

16. Enter the appropriate usernames for your routing queue.

Routing Queue

Approval Level	User Name	Required Action
10 - (HREVIEW) HR Review		Approve
20 - (PAYROL) Payroll Office		FYI
99 - (HRAPLY) HR EPAF Apply		Apply
Not Selected		Not Selected

Save and Add New Rows

17. Leave comments if desired. Please remember that no confidential information should be left in the comments.

Comment

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Save

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18. Once the necessary information is entered and the routing queue is added, click **Save** to save the EPAF. Once successfully saved, click **Submit**

Electronic Personnel Action Form

✔ Your change was saved successfully.
🔍 Enter the information for the EPAF and either Save or Submit

Name and ID: Will Smith, G00879817
Transaction: 2530 **Query Date:** Jan 14, 2014
Transaction Status: Waiting
Approval Category: Job Transfer - Part-Time Non-Teaching Staff, TRAN40

19. Warnings do not prohibit an EPAF from being submitted; only errors will prevent submission until corrected.

Electronic Personnel Action Form

✔ The transaction has been successfully submitted.
🔍 Enter the information for the EPAF and either Save or Submit

Name and ID: Will Smith, G00879817
Transaction: 2530 **Query Date:** Jan 14, 2014
Transaction Status: Approved
Approval Category: Job Transfer - Part-Time Non-Teaching Staff, TRAN40

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Type	Message Type	Description
Create Job Assignment - Hourly Staff	WARNING	*WARNING* Encumbrance has been set to 0, because method is Value Input.

20. Once an EPAF has been approved and successfully applied, the originator will receive the following email.

Completed

hrepaf@sjcd.edu

Sent: Tue 1/14/2014 3:57 PM

To: Guevara, Anna

An EPAF you submitted has been applied:

Transaction: 2530

Approval Category: Job Transfer - Part-Time Non-Teaching Staff

Approval Category Code: TRAN40

Employee Name: Smith, Will

CID: G00879817

Transaction Status: Completed

Approval Level: HR EPAF Apply

Approval Level Code: HRAPLY

Review the EPAF, login to EPAF Originator Summary via Self-Service Banner (SSB) on <http://www.sanjac.edu/soslogin>