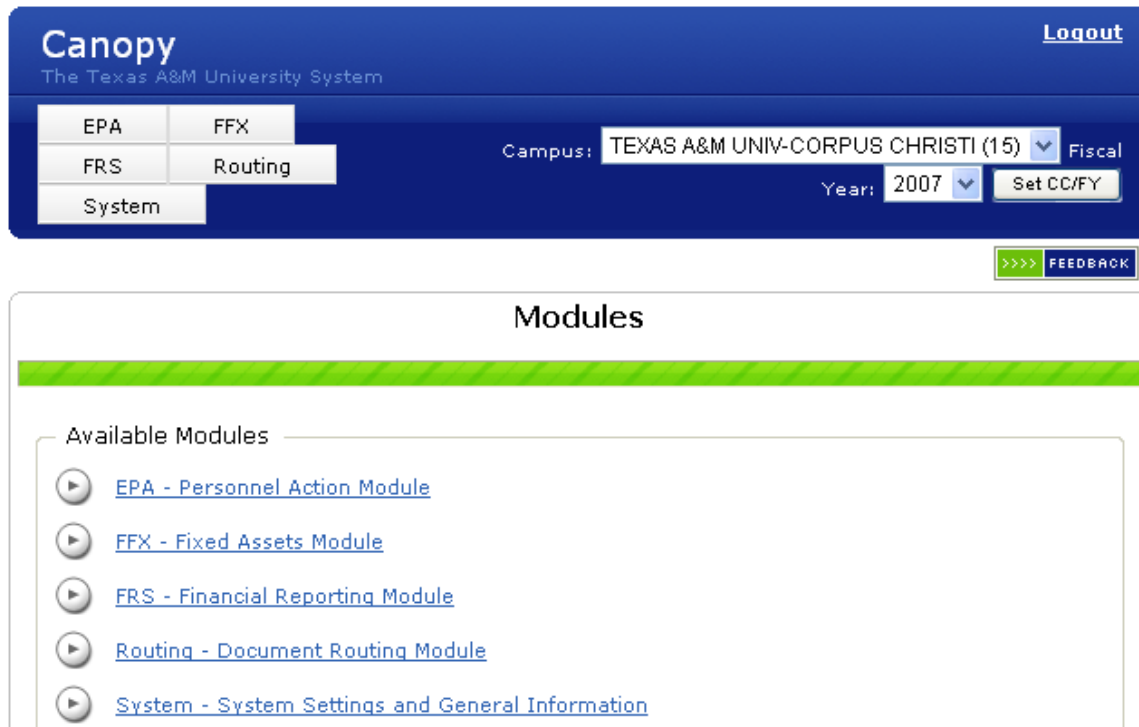


Section 10.01

EPA INSTRUCTIONS

CANOPY LOG ON

1. TO LOG ON TO CANOPY GO TO: [HTTP://CANOPY.TAMU.EDU](http://canopy.tamu.edu)
2. ENTER YOUR FAMIS/CANOPY ID AND PASSWORD: XXXX15P/PASSWORD
3. CLICK ON THE EPA - PERSONNEL ACTION MODULE



GLOSSARY FOR THE EPA MODULE

ANNUAL TERM

Defines the period of time this position will be on the payroll (located in the Position Information Header).

For typical full time budgeted positions, these dates will always be 9/1 through 8/31.

For Teaching and Graduate assistant positions, the term is often different. The person may just be employed for the fall semester (9/1 - 01/15), or the spring semester (1/16 - 5/31). Any term is valid in the system - provide the term is specified in 1/2 month increments.

ANNUAL TERM MODIFIER

Do not change the Annual term Modifier. It will default to: Normal-no breaks in term.

The Annual Term Modifier is used in a very unique situation when the annual term is not continuous for a (Non-Faculty) position. The drop down list in the EPA section of Canopy provides you with the options for the term modifier.

ITERATION

Each change to the BPP Position database is called 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. **Iterations are referred to as a history record for the position.**

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 that will pay the salary, and the object code that will be charged on the account.

EPA DOCUMENTS

Electronic documents created using Canopy.

There are three types of EPA documents:

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

SEARCHING THE EMPLOYEE DATABASE

The BPP Employee database contains the positions that current employees hold. It can be searched the following ways:

- By Name
- By SSN or UIN
- By ADLOC
- By the PIN (position) number
- By Document Number

NOTE: To further refine your search, you may limit the search by selecting from the drop down:

- Position Type – Budget or Wage
- Document Status – Active, Completed or Canceled

The following screen shows the options in refining your search.

To Search the Employees data by name:

- In the "Search for" area
- Enter the last name or the partial last name of the employee. 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). You may not enter the first name unless the entire last name is entered.
- Click the "Search" Button

In the example below, the search is for all employees that have a last name of "Dwarf"

EPA Search

Search for: Fiscal Year: Vacant Only

Position Type: Document Status:

Employee Results						
UIN	SSN	Name	Adloc	Adloc Description	PIN	Status
214-00-3317	*****567	Dwarf, Bashful A	15-120013	The Gold Mine	I70005	Active
814-00-0674	*****234	Dwarf, Grumpy A	15-120013	The Gold Mine	I70002	Active
914-00-2535	*****345	Dwarf, Happy A	15-120013	The Gold Mine	I70003	Active
114-00-5480	*****456	Dwarf, Sleepy A	15-120013	The Gold Mine	I70004	Active
117-00-5940	*****001	Dwarf, Sneezzy A	15-120013	The Gold Mine	I70006	Active

If you select one of the employees in the list, you will be transferred to the "EPA Employee Details" and this page will display additional detailed information about the employee from the BPP System.

To Search the Employees data by SSN or UIN

- In the "Search for" area
- Enter the employees full SSN or UIN. Do not use any dashes ("-") in the number.
- Click the "Search" Button

To Search the Employees data by ADLOC

- In the "Search for" area
- Enter the department's ADLOC (15XXXXXX)
- Click the "Search" Button

If you select one of the positions in the list, you will be transferred to the "EPA Employee Details" page. This page will display additional detailed information about the position in the BPP system.

To Search the Employees data by PIN

- In the "Search for" area
- Enter the PIN
 - The PIN can be 6 characters for a Budgeted PIN (I22222) or 10 characters for a Wage PIN (I822222222)
- Click the "Search" Button
 - By Default the Canopy system will show you the most recent iteration. Iterations are sequentially number changes to this position over the course of the fiscal year. To look at another iteration, simply change the "Iteration XX" drop down list.

To Search the Employees data by DOCUMENT

- In the "Search for" area
- Enter the Document number
- Click the "Search" Button

CREATING A NEW EPA DOCUMENT

Begin by selecting Create Document from the EPA Module tab.

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

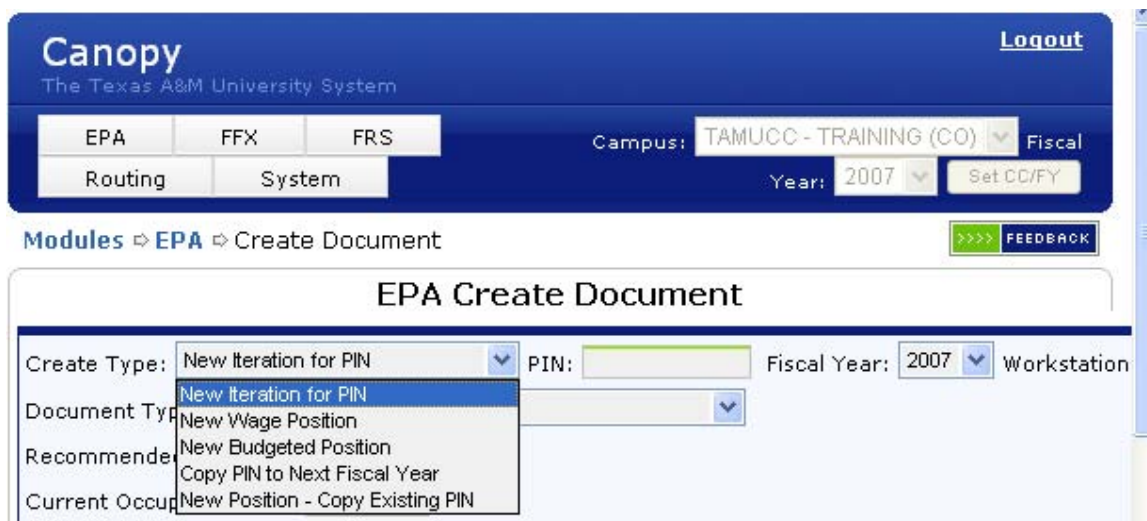
- **Is this action for a wage position or a budgeted position?**
 - Wage Positions pay an hourly rate of pay and are not eligible for benefits. Wage positions have a PIN number that consists of the A&M System work station code (I – Corpus Christi) and 9 characters that begin with an 8 (i.e. I8XXXXXXXX).
 - Budget Positions will pay a monthly salary. Budgeted positions are entitled to TAMUS benefits, provided they meet all other criteria (Percent effort, etc.). Budgeted positions have a PIN number that consists of the A&M System work station code (I – Corpus Christi) and 5 characters (i.e. IXXXXX).
- **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 wage or budget, and vacant - you are taking action on an existing position.
 - New budget or wage positions will assign a new PIN code.
- **If this is an existing position - do I know the PIN number?**
 - If not, use the search features of the EPA system to find the correct PIN number.

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

Select Create Document from the EPA Module tab.

STEP 1 - SELECT THE DOCUMENT CREATE TYPE:

The following pictures show the choices in that list.



Following is a description of each of that type:

New Iteration for 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
- Change in source of funding to an existing position
- Change in salary, Title, Term, Percent Effort to an existing position
- Insure 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 new position and you have no vacant pins.

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 Position – copy existing PIN (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.

Copy PIN to next fiscal year – copy existing PIN from last year to current year.

- 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 with data for that position and occupant information from previous fiscal year. *The recommended action will be **re-appoint/rehire** and the position action will be **re-activate position**.*

STEP 2 - SELECT THE DOCUMENT TYPE, OCCUPANT AND POSITION ACTIONS:

Your screen will look like this:

The Texas A&M University System

EPA	FFX	FRS
Purch	Routing	
System		

Campus: TAMUCC - TRAINING (CO) Fiscal Year: 2007 Set CC/FY

Modules » EPA » Create Document

FEEDBACK

EPA Create Document

Create Type: New Iteration for PIN PIN: I01942 Fiscal Year: 2007 Workstation: I

Document Type:
 New Iteration for PIN
 New Wage Position
 Recommended Action:
 New Budgeted Position
 Copy PIN to Next Fiscal Year
 Current Occupant Action:
 New Position - Copy Existing PIN

Position Action: Select...

The System will walk you through the different document types and position actions by selecting from the dropdown menus. If the actions you see do not make sense, you may have made the wrong selection in step 1.

STEP 3 - CREATE THE DOCUMENT:

After making the appropriate document type and action selections your screen should look something like the following picture. (Note: I have selected the options for hiring a new employee into an existing vacant pin.

Canopy The Texas A&M University System Logout

EPA	FFX	FRS
Routing	System	

Campus: TAMUCC - TRAINING (CO) Fiscal Year: 2007 Set CC/FY

Modules » EPA » Create Document

FEEDBACK

EPA Create Document

Create Type: New Iteration for PIN PIN: I01891 Fiscal Year: 2007 Workstation: I

Document Type: Occupant Change

Recommended Occupant Action: New Hire

Current Occupant Action: Already Vacant

Position Action: Other Actions

Create Document

If you are satisfied with what you see - press the **Create Document** button.

STEP 4 - UPDATE THE DOCUMENT INFORMATION HEADER

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

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

Fill the document out. When you are finished press the **SAVE** button as shown below.

Rate Information

Percent Effort:	<input type="text" value="100.00"/>	Pay Indicator:
Previous Percent Effort:	100.00%	Source Control:
Range/Step Code:	16/Z	Budgeted Salary:
FTE Monthly/Hourly Rate:	<input type="text" value="2400.00"/>	Previous Budgeted Sal:
Previous Monthly/Hourly Rate:	\$2,466.66	Pay Type:
Salary Action:	<input type="text" value="Hiring Salary Adjustment (HS)"/>	

Your screen will look like this:

Steps required to update/complete an EPA document (your current step is highlighted)

- 1 Edit the EPA document.
 - 1.1 Edit the header information and save any changes.
 - 1.2 Edit the individual source lines and save changes for each line.
- 2 Validate the document (this will also generate the net funding).
- 3 Review the net funding and make any necessary changes to the account information.
- 4 Close the document and route it for approval.

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

EPA Document Information			
EPA Document Number:	0005220 (coversheet)	Doc FY:	2007
Routing Document Number:	EBRCO0005220	Doc Status:	Open for Editing
Document Type:	Occupant Change (01)	Date Created:	03/08/2007 11:19 AM
Action is Effective From-To:	03/01/2007 - 08/31/2007	Last Updated:	03/08/2007 1:48 PM
Source Balance Edits Overridden:	No		
Dept/SubDept:			
Override Budget:	No	RF Cost Sharing:	No
Replace Prior Iteration(s):	No	TEES Cost Sharing:	No
Justification/Comments:	New employee starting 03/01/2007		
Attachments:			
Position Information			
PIN Number:	101891 (Budget)	Base/New Iteration:	02/03
Adloc:	15-120013 PAYROLL		
Title Code:	0106 BUDGET/PAYROLL SPECIALIST I		
Previous Title Code:	0106 BUDGET/PAYROLL SPECIALIST I		
Annual Term From-To:	09/01/2006 - 08/31/2007	Annual Term Modifier:	
Position Action:	Other Action (OA)	Annual Term Months:	12.0
Assignment Dist/Cnty:		Temporary PIN:	No
Occupant Information			
Occupant UIN:		From/To Pin:	
Occupant SSN:	123-12-3999	Occupant Name:	White, Snow B
Previous Occupant SSN:	999-99-9999	Previous Occupant Name:	Vacant
Occupant in Position From-To:	03/01/2007 -	Current Occupant Action:	Vacant (VA)
Recommended Occupant Action:	New Hire (NH)	Termination Reason:	Blank/None
Employee Location:	15120013	Check Distribution:	15120013
Rate Information			
Percent Effort:	100.00%	Pay Indicator:	Monthly - Full Time budgeted (A)
Previous Percent Effort:	100.00%	Source Control:	Normal
Range/Step Code:	16/Z		
FTE Monthly/Hourly Rate:	\$2,400.00	Budgeted Salary:	\$28,800.00
Previous Monthly/Hourly Rate:	\$2,466.66	Previous Budgeted Sal:	\$29,600.00
Salary Action:	Hiring Salary Adjustment (HS)	Pay Type:	Normal

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

Click on the EDIT button to make any other changes on this first page of your EPA document.

STEP 5 – EDIT THE FUNDING SOURCES HEADER

Once the document information header has been saved, navigate to the funding source header of the document. Click on the **Edit** button.

Your screen will look like this:

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	0106	09/01/2006 to 08/31/2007	CO - 120013-00000 PAYROLL 1515 Sal-Sup-Staff - Clas.	0010		100.00%	O/	\$1,798.50 \$21,582.00	Edit	Replicate Delete

The funding source buttons are:

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

When you edit a funding source your screen will look as follows. Make the necessary changes to the funding line and press the **Save** button.

Funding Source Lines										
Title Code	Effective Dates	Campus - Account Object Code	Acct Analysis	Pgm Code	Pct Eft	MSO/SP Flags	Monthly Pay Bud. Salary			
0106	9/1/2006	CO 120013 Sal-Sup-Staff - Clas. (1515)	0010		100.00	O <input checked="" type="checkbox"/>	\$2,466.66 \$29,600.00	Save	Cancel	
	8/31/2007									

STEP 6 - VALIDATE THE DOCUMENT

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.

[Change Type](#) [Edit](#) [Validate](#) [Close](#)

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	0106	09/01/2006 to 08/31/2007	CO - 120013-00000 PAYROLL 1515 Sal-Sup-Staff - Clas.	0010		100.00%	O/	\$2,400.00 \$28,800.00	Edit	Replicate Delete

STEP 7 - 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 will not see this section when validating a wage EPA document. You may override the requirement accounts in this section only if you have approval from the Budget Department. If you change the accounts, click on the **Edit** button, make changes and then press on the **Save** button to save the Net Funding changes.

The document was validated and net funding was generated successfully.

Funding Source Lines										
Title Code	Effective Dates	Campus - Account Object Code	Acct Analysis	Pgm Code	Pct Eft	MSO/SP Flags	Monthly Pay Bud. Salary			
0106	09/01/2006 to 08/31/2007	CO - 120013-00000 PAYROLL 1515 Sal-Sup-Staff - Clas.	0010		100.00%	O/	\$2,400.00 \$28,800.00	Edit	Replicate Delete	

Net Funding The document was validated and net funding was generated successfully.										
Campus	Source Account	Rqmt/Sav. Account	Type	Annual Net Amount	Iter Eff Date Net Amt	Future Net Amt	Past/Corr Net Amt			
CO	270001-00000-1100 TELECOMMUNICATIONS	270001-00000-1100 TELECOMMUNICATIONS	Salary Benefits Longevity	(\$29,600.00)	(\$14,799.96) \$0.00 \$0.00	(\$14,799.96) \$0.00 \$0.00	\$0.00	Edit		
CO	120013-00000-1100 PAYROLL	120013-00000-1100 PAYROLL	Salary Benefits Longevity	\$28,800.00	\$14,400.00 \$0.00 \$0.00	\$14,400.00 \$0.00 \$0.00	\$0.00	Edit		

STEP 8 - CLOSING THE EPA DOCUMENT

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

You will get the following message:

EPA Document Details

EPA Document Number: <input type="text" value="0005275"/>	Recall Comments (req): <input type="text"/>			
Submit	Recall	Reopen	Withdraw	Cancel and Void

Document is now at desk APPR1 in Office PAYROLL on Campus CO (Message: 2216)

CANCELING AN EPA DOCUMENT

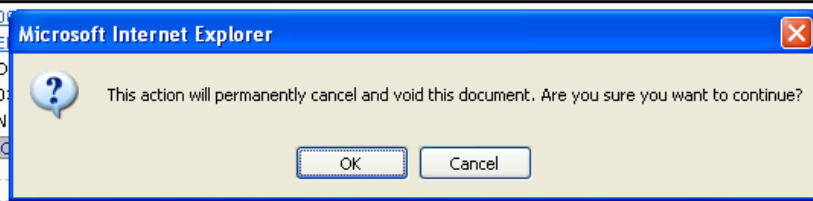
An EPA document can be cancelled at any time during the process. Simply navigate to the top of your document and click on the **Cancel and Void** button. Click the **OK** button. Cancelling the document is a final action. No further actions may be taken on a cancelled document.

EPA Document Details

EPA Document Number: Recall Comments (req):

EPA Document Information

EPA Document Number: 0005275
 Routing Document Number: EBRCO0005274
 Document Type: Source of Funding
 Action is Effective From-To: 3/1/2007 - 8/31/2007
 Source Balance Edits Overridden:
 Dept/SubDept: C



ADDING ATTACHMENTS TO THE EPA DOCUMENT

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 your department and the Central Payroll/Business offices.

Documents must be in **PDF format, and are currently limited to 500K (1/2 of 1 megabyte).**

EPA Document Information

EPA Document Number: [0005274](#)
 Routing Document Number: [EBRCO0005274](#)
 Document Type: Source of Funding
 Action is Effective From-To: -
 Dept/SubDept:
 Source Balance Edits Overridden:
 Override Budget:
 Replace Prior Iteration(s):
 Justification/Comments:

- Copy of Permanent Resident Card
- Copy of Social Security Card
- CORBA
- Direct Deposit Authorization
- Employee Personal Data Sheet pg. 1&2
- Federal I-9 Form
- Form 5-G
- Hiring Certificate
- ISS Employment Eligibility Certification
- Minor's Release Form
- New Student Employee Orientation Certificate
- Selective Service Registration Status
- Supplement
- W-4 Form
- Work Authorization Certificate

2007
 Open for Editing
 03/19/2007 6:33 PM
 03/19/2007 6:33 PM

Attachments:

Add new attachment
 Name:
 File location:

SELECT THE NAME AND FILE LOCATION AND CLICK THE ADD ATTACHMENT BUTTON.

RECALLING EPA DOCUMENTS

Search for the document you want to recall by clicking on the **My Documents** button after selecting the **EPA** Menu Tab. Select the document, type in your Recall Comments and click on the **Recall** button. You will then be able to edit the document. You will also be able to cancel the document.

The screenshot shows the Canopy interface for EPA Document Details. At the top, there are navigation tabs for EPA, FFX, FRS, and Routing, with EPA selected. Below these are dropdown menus for Campus (TAMUCC - TRAINING (CO)) and Fiscal Year (2007), along with a Set CC/FY button. A breadcrumb trail shows Modules > EPA > Document Details. The main content area is titled "EPA Document Details" and contains a form with the following fields and buttons:

- EPA Document Number: 0005275
- Recall Comments (req): To correct account number
- Buttons: Submit, Recall, Reopen, Withdraw, Cancel and Void

Documents can only be recalled if they are still in the Department Routing. Once they reach the Processing office, you will not be able to recall it.

This screenshot shows the same EPA Document Details page after a successful recall. A light blue information banner at the top displays a smiley face icon and the text: "INFO: Document 0005275 has been successfully Recalled". Below the banner, the form fields and buttons are updated as follows:

- EPA Document Number: 0005275
- Recall Comments (req): to change account number
- Buttons: Submit, Recall, Reopen, Withdraw, Cancel and Void

Click on the **Reopen** button, then the **Edit** button and make the necessary changes to the document. **Save** the document header before continuing to the funding source to make changes. **Validate** document. **Close** the document so that it will route.



INFO: Document 0005275 has been successfully Reopened

EPA Document Number: Recall Comments (req):

Steps required to update/complete an EPA document (your current step is highlighted)

- 1 Edit the EPA document.
 - 1.1 Edit the header information and save any changes.
 - 1.2 Edit the individual source lines and save changes for each line.
- 2 Validate the document (this will also generate the net funding).
- 3 Review the net funding and make any necessary changes to the account information.
- 4 Close the document and route it for approval.

TITLE CODES MOST OFTEN USED FOR PART-TIME EMPLOYEES (Paid Biweekly)

<u>STUDENT EMPLOYEE TITLE CODES</u>		<u>OBJECT CODES</u>
7701	Student Assistant(Institutional Worker) Non-exempt, student status required, no degree required Must Complete Pink Packet	1740
7702	Federal College Work Study Student Non-Exempt, student status required, no degree required Must Complete Pink Packet	1745
7703	State College Work Study Student Non-Exempt, student status required, no degree required Must Complete Pink Packet	1750
<u>STUDENT EMPLOYEE TITLE CODES</u>		<u>OBJECT CODES</u>
7704	Research Assistant Non-Exempt, student status required, no degree required Must Complete Orange Packet	1740
7705	Reader/grader (previously 0510) Non-Exempt, student status required, no degree required	1740

Must Complete Orange Packet

7706 Student Interim 1740
 Non-Exempt, student status required, no degree required
 Course credit received for work efforts
 Must Complete Orange Packet

7707 Undergraduate Instructional Assistant 1740

7708 State Work-Study Mentor (OBJ 1751)-Restricted to the Tutoring and Learning Center ONLY 1751

9120 Graduate Assistant/Non-Teaching 1715
 Exempt, student status required, degree required
 Must Complete Orange or Yellow packet

9121 Graduate Assistant/Research 1715
 Exempt, student status required, degree required
 Must Complete Orange or Yellow packet

NON-STUDENT EMPLOYEE TITLE CODE

OBJECT CODES

0511 Tutor 1720
 Non-exempt, student status not required, no degree required
 Must Complete Orange Packet

5005 Research Assistant 1720
 Non-exempt, student status not required, no degree required
 Must Complete Orange Packet

7511 Adjunct Faculty 1710
 Exempt, Student status no required, degree required
 Must Complete Blue Packet

7602 Research Associate 1720
 Exempt, student status not required, degree required
 Must Complete Orange Packet

NOTE: Undergraduate Students-non-benefits eligible