



INSTRUCTIONS: REVIEWING & APPROVING OFFER CARDS

BEST PRACTICES FOR EPA AUTOMATION



APPROVER ROLE & RESPONSIBILITY

With the PageUp to Banner integration, the role of the Page Up Offer Card Approvers must now include similar check to those previously completed during the ePA approval. The chart below is intended to provide a checklist of items to review.

| FIELD NAME | WHAT TO CHECK | HR CHECK | DEPT CHECK |
|--|---|----------|------------|
| <input checked="" type="checkbox"/> PURPOSE OF APPOINTMENT | Confirm the selected appointment purpose (<i>Additional Assignment, Demotion, New Hire, Promotion, Transfer</i>) is accurate based on the selected candidate's current status with UA | | |
| <input checked="" type="checkbox"/> APPOINTMENT TYPE | Confirm the selected employee class is consistent with the information on the position description, requisition and NBAPOSN | | |
| <input checked="" type="checkbox"/> CANDIDATE EXPECTED START DATE | Confirm the selected start date meets the pre-employment timeline established by Talent Acquisition. Confirm all applicable start date policies (<i>ex: Mondays for staff New Hires</i>) have been considered with selected start date. | | |
| <input checked="" type="checkbox"/> UNTIL FURTHER NOTICE | If "Yes" has been selected, confirm the position is not a temporary position. Also confirm an end date has NOT been entered in the next field. If "No" has been selected, confirm an end date has been entered in the next field. | | |
| <input checked="" type="checkbox"/> END DATE OF APPOINTMENT | Confirm "No" has been selected in the "Until Further Notice" field above. Confirm end date is after start date. If the position is a temporary position, confirm the end date is with 12 months of the start date. | | |
| <input checked="" type="checkbox"/> SALARY PAID BY | Confirm the selected Salary Paid By option is consistent with the e-class. Non-exempt (BW) e-classes should have "Hour" selected. Exempt (MO) e-classes should have "Year" selected, unless it is a Faculty position with semester start and end dates, then "Semester" should be selected. Start and end dates used should also match semester dates. | | |
| <input checked="" type="checkbox"/> RECOMMENDED HOURLY RATE OR ANNUALIZED SALARY | Confirm the recommended pay is consistent with the format for the "paid by" field. Confirm a dollar sign "\$" is included and amount includes two decimal places. If "Year" was selected, the amount should be entered as an annual salary that is divisible by 12. For example, use \$65,000.04 instead of \$65,000.00 because the monthly rate will need to calculate to exactly \$5,416.67 for the ePA. If "Hour" was selected, the amount should be the hourly rate of pay. If "Semester" was selected, the amount should be the semester salary that is divisible by 4.5. Confirm there are no market / equity issues (HR). Confirm funding is available (Dept). | | |



APPROVER ROLE & RESPONSIBILITY (CONTINUED)

| FIELD NAME | WHAT TO CHECK | HR CHECK | DEPT CHECK |
|---|---|----------|------------|
| <input checked="" type="checkbox"/> CONTRACTS OR GRANTS FUNDED? | Confirm "Yes" is selected from the drop down only if the position will be funded by contracts and/or grants. This will ensure the offer card and ePA routings include the necessary financial approvers. | | |
| <input checked="" type="checkbox"/> FTE | Confirm the FTE is 1.0 or less. Confirm the FTE used is consistent with the e-Class for the position (part time, full time, etc.) | | |
| <input checked="" type="checkbox"/> WILL THERE BE RELOCATION? | Confirm "Yes" is selected only if the position will be receiving relocation allowance that should be included in the offer letter. | | |
| <input checked="" type="checkbox"/> IF YES, THE AMOUNT | If "Yes" has been selected, confirm a dollar amount is listed in this field. Confirm a dollar sign "\$" was not used in this field. Confirm there are no market / equity issues (HR). Confirm funding is available (Dept). | | |
| <input checked="" type="checkbox"/> IF YES, THE TYPE OF RELOCATION | If "Yes" has been selected, confirm this field is complete with the type of relocation allowance (ex: moving expense, house hunting trip, temporary living expenses) | | |
| <input checked="" type="checkbox"/> IS THIS A CURRENT UA STAFF? | Confirm "Yes" is selected only if the candidate is a current UA staff employee. | | |
| <input checked="" type="checkbox"/> IF YES, THE GRADE AND TITLE | If "Yes" has been selected, confirm the grade and title listed matches the current position in Banner. | | |
| <input checked="" type="checkbox"/> IF YES, CURRENT RATE OF PAY / SALARY | If "Yes" has been selected, confirm the rate of pay / salary listed matches the current rate in Banner. | | |
| <input checked="" type="checkbox"/> SIX MONTH INTRO PERIOD REVIEW REQUIRED? | Confirm "Yes" has been selected if the position is a regular staff position and any of the following apply: (1) the candidate is an external hire (2) the candidate is being promoted or transferred to this position during their introductory period (3) the candidate is changing from a temporary status to a regular status (4) the candidate is a non-exempt employee moving into an exempt position. Otherwise, confirm "No" was selected. | | |



INSTRUCTIONS: APPROVING OFFER CARD IN PAGE UP

APPROVER ROLE & RESPONSIBILITY (CONTINUED)

| FIELD NAME | WHAT TO CHECK | HR CHECK | DEPT CHECK |
|---|---|----------|------------|
| <input checked="" type="checkbox"/> FOAP ACTIVITY 1 | <p>Confirm the field does not start with the chart of accounts letter (ex: A- before the FOAP)</p> <p>Confirm formatting matches instructions (exactly)</p> <p>Fund number-Org Code-Account Number-Program Code-Activity Code <i>(if applicable)</i></p> <p>#####-#####-#####-###-##### (dashes should separate number; no spaces!)</p> <p>Confirm the correct FOAP has been used (Dept Only)</p> | | |
| <input checked="" type="checkbox"/> PERCENTAGE FOR ACTIVITY 1 | Confirm percentage has been listed for the portion of the position that will be funded by the FOAP in Activity 1. Confirm percent sign (%) has not been entered in field. If this is the only FOAP, it should be 100. | | |
| <input checked="" type="checkbox"/> FOAP ACTIVITY 2, 3, & 4 | Confirm these fields are completed if additional funding sources are being used. The same checklist items from FOAP Activity 1 apply to 2, 3, and 4. If position is only funded by 1 FOAP, these fields should be blank. | | |
| <input checked="" type="checkbox"/> PERCENTAGE FOR ACTIVITY 2, 3, & 4 | Confirm a percentage as been listed for the portion of the position that will be funded by the FOAP in Activity 2, 3, and 4 <i>(if applicable)</i> . Confirm percent sign (%) has not been entered in fields. All percentage fields combined should equal 100. | | |
| <input checked="" type="checkbox"/> BUDGET CHANGE NUMBER | Confirm the field has "funded" or z-number listed. Confirm the information listed is correct (Dept) | | |
| <input checked="" type="checkbox"/> ONBOARDING FORM | Confirm Standard Onboarding Form has been selected for the Form field. | | |
| <input checked="" type="checkbox"/> ONBOARDING WORKFLOW | Confirm the correct Onboarding Workflow has been selected based on the current status of the applicant being hired and the type of position the applicant is being hired into. | | |
| <input checked="" type="checkbox"/> SUPERVISOR | Confirm the individual listed is the supervisor for the position. | | |
| <input checked="" type="checkbox"/> ONBOARDING DELEGATE | Confirm the individual listed is the correct point of contact for the department to receive onboarding related communications. | | |
| <input checked="" type="checkbox"/> EPA POINT OF CONTACT | Confirm the individual listed is the correct point of contact for the department to receive EPA related communications. | | |