A Guide to Creating Employee Payroll Actions (EPA)
Introduction

This document was developed to assist departmental staff in creating employee payroll actions, or EPAs, using the on-line Canopy system. This basis for this guide centers on the 7 “document types” that all EPAs begin from:

(01) Occupant Change  
(02) Create or Reactivate  
(03) Source Funding Change  
(04) Change Salary / Title / Term  
(05) End of Term  
(06) Eliminate Position  
(07) Other Changes

After determining the document type that is needed, you will be prompted by Canopy through a series of drop down menus for the remaining required action. In the following sections, you will be provided guidance on how to create each of these document types, a detailed description of the EPA “Shell” Fields, were to gather the required information, and best practices.

Example screenshots of the creation process are included for each document type.

Because Canopy was developed for use by all System Members there may be some choices in the drop down menus that are not discussed in this guide and are not used by Main Campus (MPins). We encourage you to follow the instructions given for successful and error-free EPA creation. In all cases you will use the EPA > Create Document tab to get started.
(01) Occupant Change

**This document type is used to place an individual into a vacant existing PIN that has already been established in the payroll system. It is also used to remove an individual out of the PIN to make it vacant and available for further use. The PIN must be active in the current fiscal year for this option to be used.**

Begin the EPA by selecting “New Iteration for PIN” as the Create Type, since you already have a PIN.

Enter the established “M” PIN number in the PIN Field (example – M99999).

The Fiscal Year defaults to the current fiscal year. Click the arrow on the drop down box to select a different fiscal year for your action if needed.

Workstation will always be “M”. Enter this letter into the field. Since Canopy and EPAs are used for the entire TAMU System the field always defaults to “blank”.

The following Recommended Occupant Actions are available when processing an occupant change:

1. **New Hire.** A new employee who has not previously worked under any type of “M” PIN. This individual may have previously been employed for a different TAMU System member but they are still considered new to Main Campus employment. All new hire paperwork must be completed as listed on the EPA Document checklist available under “Forms” at [http://payroll.tamu.edu/](http://payroll.tamu.edu/).

2. **Transfer In.** When an active employee moves from one PIN to a different PIN, both of which are assigned the same salary range, title or organizational level.

3. **Promote In.** When an active employees moves from one PIN to a different PIN requiring higher qualifications or responsibilities, a higher rate of pay and a title change.

4. **Demote In.** When an active employee moves from one PIN to a different PIN requiring less qualifications or responsibilities, a lower rate of pay and a title change.

5. **Rehire.** A rehire is an employee who has previously worked or is currently working under any type of “M” PIN. If they are being rehired more than 30 days past their prior employment termination date, a new set of new hire paperwork must be completed as listed on the EPA Document checklist available under “Forms” at [http://payroll.tamu.edu/](http://payroll.tamu.edu/).

6. **Return from Leave.** An employee who is returning from Leave without Pay in the same fiscal year that they started leave without pay.

7. **Make Vacant.** Used when you need to take further action on the employee currently in the PIN, such was Retire, Voluntary Terminate, Involuntary Terminate, Promote Out, Transfer Out, Demote Out or Start Leave.

For Actions #1 through #6 noted above, the Current Occupant Action selected must ALWAYS be “Already Vacant”.

The Following Current Occupant Actions are available when selected #7 – Make Vacant:

a) **Retire.** Officially retiring from TAMU System employment. A copy of the “Acknowledgement of Employee Retirement” form must be attached to the EPA.

b) **Voluntary Terminate.** Mutually agreeable termination.

c) **Involuntary Terminate.** Used for Dismissal for Cause or Reduction in Force. Both
Actions require HR and/or General Counsel’s review. A copy of the approval form from HR or expanded comments outlining the required reviews were made and approved should be part of the EPA. Also used when active employee becomes deceased (death).

d) **Promote Out.** The Employee is moving within the TAMU system to a different PIN requiring higher qualifications, a higher rate pay and a title change per System Regulation 31.01.01, Section 2.3.1.

e) **Transfer Out.** The Employee is moving within the TAMU System to a different PIN with the same salary range, title or organizational level per System Regulation 31.01.01, Section 2.3.4.

f) **Demote Out.** The Employee is moving within the TAMU system to a different PIN with a lower pay range and/or less senior title requiring less education, experience and responsibility per System Regulations 31.01.01, section 2.3.2.

g) **Start Leave.** Employee is going on leave without pay (LWOP) after exhausting all other leave resources. An EPA should not be submitted until the employee has been on LWOP for thirty (30) days.

The Following Position Actions are available when processing an occupant change:

- **Other Action.** Selected for almost all EPAs.
- **Change Title.**
  - Budget Pins – this should be selected if your department obtained approval to reclassify an existing pin during the hiring process. A copy of the HR Path email approving this change should be attached to the EPA.
  - Wage Pins – this should be selected if your department wishes to change the title of the wage position during the process.

Once these selections have been made, click the “Create Document” button. At this point, you will be able to edit the “shell” of the EPA document, save and validate your changes and route for signatures.

Canopy Screenshot of Occupant Change with New Hire
Canopy Screenshot of Occupant Change with Rehire and Budget Pin Reclassification

Canopy Screenshot of Occupant Change with Transfer In

Canopy Screenshot of Occupant Change to Vacate Position
(2) Create or Reactivate Position
**This document type is used for the situations listed below; begin the EPA by selecting one of these three options as the Create Type,**

New Wage Position (Create Position). The PIN has not yet been created; a PIN will be assigned by Canopy during the EPA preparation process. Use for student and non-student positions non-benefit eligible hourly paid position.

New Budget Position (Create Position). The PIN has not yet been created; a PIN will be assigned by Canopy during the EPA preparation process. Use for benefit-eligible positions hourly or monthly paid. A Copy of the HR Path email approving the new pin should be attached to the EPA for Classified and Non-Classified positions.

Copy Pin to Next Fiscal Year (Reactivate Position). When you are bringing forward an existing vacant wage or budget PIN already established in the payroll system but not active in the current fiscal year. You are not creating a new PIN.

Leave the PIN field “blank” to create a new wage or budget position or enter the established “M” PIN number in the PIN Field (example – M99999) for reactivate position.

The Fiscal Year defaults to the current fiscal year. Click the arrow on the drop down box to select a different fiscal year for your action if needed.

Workstation will always be “M”. Enter this letter into the field. Since Canopy and EPAs are used for the entire TAMU System the field always defaults to “blank”.

The following Recommended Occupant Actions are available when processing an occupant change:

1. **New Hire**. A new employee who has not previously worked under any type of “M” PIN. This individual may have previously been employed for a different TAMU System member but they are still considered new to Main Campus employment. All new hire paperwork must be completed as listed on the EPA Document checklist available under “Forms” at [http://payroll.tamu.edu/](http://payroll.tamu.edu/).
2. **Transfer In**. When an active employee moves from one PIN to a different PIN, both of which are assigned the same salary range, title or organizational level.
3. **Promote In**. When an active employees moves from one PIN to a different PIN requiring higher qualifications or responsibilities, a higher rate of pay and a title change.
4. **Demote In**. When an active employee moves from one PIN to a different PIN requiring less qualifications or responsibilities, a lower rate of pay and a title change.
5. **Rehire**. A rehire is an employee who has previously worked or is currently working under any type of “M” PIN. If they are being rehired more than 30 days past their prior employment termination date, a new set of new hire paperwork must be completed as listed on the EPA Document checklist available under “Forms” at [http://payroll.tamu.edu/](http://payroll.tamu.edu/).
6. **Return from Leave**. An employee who is returning from Leave Without Pay in the new fiscal year if they started leave without pay in the prior fiscal year.
7. **Create Vacant**. Do Not Use

The Current Occupant Action defaults to “Already Vacant”
The Following Position Actions are available when processing create or reactive position:

- **Create Position.** This is selected when you are actually creating a new PIN for a newly created position. This tells Canopy to generate a new PIN in the shell of the EPA.
- **Reactivate Position.** This is selected when you are using a vacant existing PIN and reestablishing it in the current fiscal year.

Once these selections have been made, click the “Create Document” button. At this point, you will be able to edit the “shell” of the EPA document, save and validate your changes and route for signatures.

![Canopy Screenshot for Creating New Wage Position / New Hire](image)

![Canopy Screenshot for Creating New Budget Position / Rehire](image)

![Canopy Screenshot for Reactivating Existing Budget Position for Graduate Student](image)
(3) Source Funding Change

**This document type is used to change primary account numbers, support account numbers, or to change the percentages on account numbers of active employees. There is a maximum of 20 source lines that can be utilized on a source funding change EPA.

Begin the EPA by selecting “New Iteration for PIN” as the Create Type, since you already have a PIN.

Enter the established “M” PIN number in the PIN Field (example – M99999).

The Fiscal Year defaults to the current fiscal year. Click the arrow on the drop down box to select a different fiscal year for your action if needed.

Workstation will always be “M”. Enter this letter into the field. Since Canopy and EPAs are used for the entire TAMU System the field always defaults to “blank”.

Recommended Occupant Action defaults to “Not Applicable” and cannot be changed.

Current Occupant Action defaults to “Not Applicable” and cannot be changed.

Position Action defaults to “Other Action” and cannot be changed.

Once these selections have been made, click the “Create Document” button. At this point, you will be able to edit the “shell” of the EPA document, save and validate your changes and route for signatures.

Canopy Screenshot for Source Funding Change
(04) Change Salary, Title, Term, Percent Effort or Promote

**This document type is used when wage or budgeted salary rate will change, a wage position title will change, a budget position title is reclassified, annual term months need to be modified or a percent effort change is needed. Source funding can also be changed if other actions are needed with the same action effective date. This document type allows multiple changes to be implemented using one EPA.**

Begin the EPA by selecting “New Iteration for PIN” as the Create Type, since you already have a PIN.

Enter the established “M” PIN number in the PIN Field (example – M99999).

The Fiscal Year defaults to the current fiscal year. Click the arrow on the drop down box to select a different fiscal year for your action if needed.

Workstation will always be “M”. Enter this letter into the field. Since Canopy and EPAs are used for the entire TAMU System the field always defaults to “blank”.

The following Recommended Occupant Actions are available when processing an occupant change:

1. **Change Salary, Term, Percent Effort.**
   - (a) Changes to a Budget Pin Hourly Wage or Monthly Salary cannot be retroactive per Texas State law and should follow University Rule 31.01.01.M7 – Employee Compensation Administration.
   - (b) If an Adloc is making a budgeted salary increase that is greater than the maximum specified by HR, a “memo of exception” routed through and signed per SAP 31.99.99.M0.01 is required and must be attached to the EPA.
   - (c) Changes to a Wage Pin Hourly Rate cannot be retroactive per Texas State Law; Student pay rates are administered by the Dept. of Scholarships & Financial Aid; non-student wage pin pay rates are administered by Human Resources.
   - (d) Changes to the term of a Budget Pin that will result in the position not having either a 12-month annual term or a 9-month annual term will require the selection of an Annual Term Modifier of A, B, C, or D in the shell of the EPA.

2. **Change Title.** Used to change the Title for a Wage Pin and can be used if the new title code is the same Pay Indicator and Object Code as the previous title code. If they are not the same two EPAs will need to be created; one to transfer out of the current title and one to transfer in to the new title.

3. **Promote Within.** Cannot be used if a pin is being reclassified or the title is changing.

4. **Ingrade Promotion.** Do Not Use

5. **Demote Within.** Cannot be used if a pin is being reclassified or the title is changing.

6. **Reclassification.** Used to change the title of an active Budget Pin Employee. HR must pre-approve the reclassification of an existing pin; a copy of the HR Path email approving the change must be attached to the EPA. This should be the primary action selected, even if you are also making other changes such as pay rate. DO NOT Choose the action of “Promote Within” if HR has reclassified the position.

Current Occupant Action defaults to “Not Applicable” and cannot be changed.
The Following Position Actions are available when processing change salary, term, percent effort:

- Change Salary or Percent Effort (OA)
- Change Term/Period (CP)

The Position Action defaults to either “Change Title” or “Reclassification” when one of these is the corresponding Recommended Occupant Action and cannot be changed.

Once these selections have been made, click the “Create Document” button. At this point, you will be able to edit the “shell” of the EPA document, save and validate your changes and route for signatures.

Canopy Screenshot for Change of Salary for Wage PIN Employee

Canopy Screenshot for Change Term for Faculty Budget Pin

Canopy Screenshot for Change Title for Student to Work Study Student
Canopy Screenshot for Reclassification of Budget Pin Position

Canopy Screenshot for Change Percent Effort for Graduate Student Budget Pin
(05) End of Term

**This document type is only used when an employee is budgeted in a position for a certain period of employment and they work the last day of the period. End of Term EPAs do not release any encumbrances, as there are not any remaining at the end of the term.

Examples:
A Graduate Student is in a 9-month Budget PIN; they will work for the same department in a student title Wage PIN starting the day after the last day worked of 5.31.xx.

An employee in a Budget PIN is retiring and their last day worked will be 8.31.xx.

Begin the EPA by selecting “New Iteration for PIN” as the Create Type, since you already have a PIN.

Enter the established “M” PIN number in the PIN Field (example – M99999).

The Fiscal Year defaults to the current fiscal year. Click the arrow on the drop down box to select a different fiscal year for your action if needed.

Workstation will always be “M”. Enter this letter into the field. Since Canopy and EPAs are used for the entire TAMU System the field always defaults to “blank”.

Recommended Occupant Action defaults to “End of Term – No change” and cannot be altered.

The Following Current Occupant Actions are available when processing End of Term:

1. **Retire.** Officially retiring from TAMU System employment. A copy of the “Acknowledgement of Employee Retirement” form must be attached to the EPA.
2. **Voluntary Terminate.** Mutually agreeable termination.
3. **Involuntary Terminate.** Used for Dismissal for Cause or Reduction in Force. Both Actions require HR and/or General Counsel's review. A copy of the approval form from HR or expanded comments outlining the required reviews were made and approved should be part of the EPA for budgeted PINS. Also used when active employee becomes deceased (death).
4. **Promote Out.** The Employee is moving within the TAMU system to a different PIN requiring higher qualifications, a higher rate pay and a title change per System Regulation 31.01.01, Section 2.3.1.
5. **Transfer Out.** The Employee is moving within the TAMU System to a different PIN with the same salary range, title or organizational level per System Regulation 31.01.01, section 2.3.4.
6. **Demote Out.** The Employee is moving within the TAMU system to a different PIN with a lower pay range and/or less senior title requiring less education, experience and responsibility per System Regulations 31.01.01, section 2.3.2
7. **Start Leave.** Employee is going on leave without pay (LWOP) after exhausting all other leave resources. An EPA should not be submitted until the employee has been on LWOP for thirty (30) days.

The Position Actions defaults to “End of Term” and cannot be altered.
Once these selections have been made, click the “Create Document” button. At this point, you will be able to edit the “shell” of the EPA document, save and validate your changes and route for signatures.

**NOTE:** If an EPA is started as “End of Term” it cannot be changed to “Eliminate”. You will need to cancel the End of Term document and start over.
(06) Eliminate Position

**This document type is used when an employee leaves a Wage PIN or a Budget PIN position on any day other than the last day of the term. Eliminate Position EPAs release all encumbrances based on the action effective date of the EPA. The action effective date must be the DAY AFTER the employees last day worked.**

Begin the EPA by selecting “New Iteration for PIN” as the Create Type, since you already have a PIN.

Enter the established “M” PIN number in the PIN Field (example – M99999).

The Fiscal Year defaults to the current fiscal year. Click the arrow on the drop down box to select a different fiscal year for your action if needed.

Workstation will always be “M”. Enter this letter into the field. Since Canopy and EPAs are used for the entire TAMU System the field always defaults to “blank”.

Recommended Occupant Action defaults to “Eliminate/Vacate” and cannot be altered.

The Following Current Occupant Actions are available when processing Eliminate Position:

1. **Already Vacant.** Used to eliminate a Vacant Pin that is still active in the current fiscal year budget. Pin may have rolled over from prior fiscal year or been vacated as an Occupant Change but department has determined it will not be filled. A copy of a memo signed by the VP of a Division or Dean of the Department approving the budgeted position be eliminated should be attached to the EPA.

2. **Retire.** Officially retiring from TAMU System employment. A copy of the “Acknowledgement of Employee Retirement” form must be attached to the EPA.

3. **Voluntary Terminate.** Mutually agreeable termination.

4. **Involuntary Terminate.** Used for Dismissal for Cause or Reduction in Force. Both Actions require HR and/or General Counsel’s review. A copy of the approval form from HR or expanded comments outlining the required reviews were made and approved should be part of the EPA for budgeted PINs. Also used when active employee becomes deceased (death).

5. **Promote Out.** The Employee is moving within the TAMU system to a different PIN requiring higher qualifications, a higher rate pay and a title change per System Regulation 31.01.01, Section 2.3.1.

6. **Transfer Out.** The Employee is moving within the TAMU System to a different PIN with the same salary range, title or organizational level per System Regulation 31.01.01, section 2.3.4.

7. **Demote Out.** The Employee is moving within the TAMU system to a different PIN with a lower pay range and/or less senior title requiring less education, experience and responsibility per System Regulations 31.01.01, section 2.3.2

8. **Start Leave.** Employee is going on leave without pay (LWOP) after exhausting all other leave resources. An EPA should not be submitted until the employee has been on LWOP for thirty (30) days.

The Position Actions defaults to “Eliminate” and cannot be altered.
Once these selections have been made, click the “Create Document” button. At this point, you will be able to edit the “shell” of the EPA document, save and validate your changes and route for signatures.

**NOTE**: If an EPA is started as “Eliminate” it cannot be changed to “End of Term”. You will Need to **cancel** the Eliminate document and start over.
(07) Other Changes

This document type is used for actions not covered by the other six document types. At this time these are two options available when creating your EPA:

Begin the EPA by selecting “New Iteration for PIN” as the Create Type, since you already have a PIN.

Enter the established “M” PIN number in the PIN Field (example – M99999).

The Fiscal Year defaults to the current fiscal year. Click the arrow on the drop down box to select a different fiscal year for your action if needed.

Workstation will always be “M”. Enter this letter into the field. Since Canopy and EPAs are used for the entire TAMU System the field always defaults to “blank”.

Recommended Occupant Action defaults to “Not Applicable” and cannot be altered.

The Following Current Occupant Actions are available when processing Other Changes:

- **Change Name.** Used to correct the name via EPA of an Active Employee. The EPA should contain the current name in the budget. Do not attempt to update the name yourself. Attach a copy of the Employee’s updated Social Security Card to the EPA and make note in comments. Payroll will revise the EPA with the new name after the UIN database has been updated.

- **Reassign Admin.** Used when an Employee and Position (PIN) are being assigned to a different ADLOC. Funding source(s) may or may not change.

Position Action defaults to “Other Action” when change name is selected and will default to “Reassign Admin” when an ADLOC change is selected. This field cannot be altered.

Once these selections have been made, click the “Create Document” button. At this point, you will be able to edit the “shell” of the EPA document, save and validate your changes and route for signatures.

Canopy Screenshot for Change Name
Canopy Screenshot for Reassign Admin
EPA “Shell” Field Specifics

When you hit the “Create Document” button a new Window opens with an EPA “Shell”. Some data will automatically filter in from the last iteration depending on the type of document created. You will need to complete all pertinent fields to be able to save, validate and route your EPA for signature.

**Section 1. EPA Document Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doc FY</td>
<td>Filters in from the choice selected on the “Create Document” screen.</td>
</tr>
<tr>
<td>Doc Status</td>
<td>Generated by Canopy; should read “Open for Editing” to start</td>
</tr>
<tr>
<td>Document Type</td>
<td>Filters in from the choice selected on the “Create Document” screen.</td>
</tr>
<tr>
<td>Date Created</td>
<td>Automatically generated by Canopy.</td>
</tr>
<tr>
<td>Action is Effective From-To</td>
<td>From is “When the action starts”; this may not always be the same as the annual term. To is “When the Action Ends”; this date is usually last day of current fiscal year or last day of a defined term.</td>
</tr>
<tr>
<td>Last Updated</td>
<td>Automatically generated by Canopy.</td>
</tr>
<tr>
<td>Dept/SubDept</td>
<td>Blank</td>
</tr>
<tr>
<td>Source Balance Edits Overridden</td>
<td>Defaults to “No” – If you do need to override the funding you must click the open box so a check mark is inserted to change selection to “Yes”. Yes may need to be selected when the funding doesn’t cover the entire annual term due to limited funding or timing grants are awards. These EPAs normally route through the department’s Budget Office before reaching payroll.</td>
</tr>
</tbody>
</table>
J. **Roll to New FY**: Only available for a period of time in August & September. Used to create EPAs after the budget rollover process with effective dates in current fiscal year needing to carry over to new fiscal year. An example would be if active Budget Pins Rolled as of August 15th and you hire an employee in a newly created pin who starts working August 25th, if you check the box so this option changes to “Yes” the new employee’s PIN will be active in both the current and new fiscal year using one EPA.

K. **Override Budget**: Defaults to “No” – If you do need to override the funding you must click the open box so a check mark is inserted to change selection to “Yes”. Yes may need to be selected when there is not enough money in an account to cover the salary for an employee. These EPAs normally route through the department’s Budget Office before reaching payroll.

L. **RF Cost Sharing**: Selected by departments who do Research Foundation cost sharing.

M. **Replace Prior Iteration(s)**: Used when a new iteration has the same effective date as the prior iteration. It replaces all the information previously submitted.

N. **TEES Cost Sharing**: for departments who do Engineering cost sharing.

O. **Justification/Comments**: A place for the department to provide a detailed description of the reason the EPA was created.

P. **Attachments**: All required backup documents supporting the EPA action need to be attached to the EPA. Security of Confidential Information: Please be aware of University Rules/SAPS related to protecting confidential information. It is the responsibility of the information owner to ensure that adequate security measures are in place in the department to keep information secure. Payroll Services requires documents which contain confidential information to process EPAs. We encourage you to attach those that you can to the EPA in CANOP, which is a secure location. You should be deleting these scanned items from your computer system after they are attached to the EPA. The only document that contains confidential information which is required when finalizing the UIN Base Record prior to EPA creation is the “UIN / BPP Base Record or Temporary ID Request” form; this form should be sent via Filex or sent via fax to the number of the form; if faxing, send an email to payrollprocessing@tamu.edu alert the processors that a fax has been sent requesting this time sensitive number. If you have questions regarding the requirement for secure submission of the information that your IT staff cannot assist you with, please contact the Information Technology Issues Management (ITIM) group in Networking and Information Security at itimWtamu.edu. We appreciate your assistance in keeping the university and your employee’s information secure.
2. Section 2 – Position Information

A. **Pin Number:** Automatically generated by Canopy or entered during the “Create Document” stage.

B. **Base/New Iteration:** Automatically generated by Canopy.

C. **Adloc:** Administrative Location, which is unique to each department

D. **Title Code:** A four-digit number assigned to position / position description by HR.

E. **Previous Title Code:** Title Code Previous Assigned to an Established Pin (can also be the current title code); this filters in from the active budget; will be blank for a “Create Position” action.

F. **Annual Term From-To:** Most annual terms are for 12-months – 9.01.xx to 8.31.xx.; faculty or grad assistants may be in a nine-month or other term.

G. **Annual Term Modifier:** Defaults to blank – none. Used to avoid error message of funding not matching annual term. Canopy has an edit to make sure the annual term is covered in the funding source lines. **If a Budget Pin does not have a 12-month or 9-month term, an annual term modifier of A, B, C or D must selected or the EPA will be rejected.**

   - Blank – No break in term
   - Modifier “A” – Break from 0601-0715
   - Modifier “B” – Break from 0116-0531
   - Modifier “C” – Break from 0116-0715
   - Modifier “D” – Other Break (Non-Specified)

H. **Position Action:** Filters in from the choice selected on the “Create Document” screen.

I. **Annual Term Months:** Should Match the Annual Term From-To period

J. **Assignment Dist/Cnty:** Leave blank

K. **Temporary Pin:** only used for employees who stay on Payroll to train their replacement. Not for temporary wage positions. Most people will transfer into a temporary pin so their replacement can occupy their old pin. Temporary pins should be eliminated when the employee terminates.
3. Section 3 – Occupant Information

A. Occupant UIN: Will filter in after social security number is entered; may filter in from active budget with some EPA types.

B. From/To Pin: used for transfer / promotions only. From Pin used for Transfer or Promote In and To Pin used for Transfer or Promote Out. There may be cases when you need to enter “M99999” if you are unable to obtain the pin they are moving from / to.

C. Occupant SSN: Entered by department or will filter in from active budget if SSN from UIN database and SSN entered on EPA match.

D. Occupant Name: Please enter last, first, middle and any suffix in the fields. Name will be on one line when EPA is finalized.

E. Previous Occupant SSN: Will filter in from active budget or leave blank.

F. Previous Occupant Name: Will filter in from active budget or leave blank

G. Occupant in Position From-To: Will filter from the “From:” date entered in the EPA Document Information Section.

H. Current Occupant Action: Filters in from the choice selected on the “Create Document” screen.

I. Recommended Occupant Action: Filters in from the choice selected on the “Create Document” screen.

J. Termination Reason: the following choices are available from the drop down menu:
   - 59 – Resignation / Reasons Known or Unknown (Voluntary terminate)
   - 63 – Termination at Will / requires HR review (Involuntary termination)
   - 64 – Reduction in Force
   - 65 – Transfer to non-A&M System Agency or institution of high education with no break in service
   - 66 – End or expiration of contract or grant
   - 68 – Retirement
   - 69 – Death (Involuntary terminate)
K. Employee Location: Used for campus directory and other programs such as AggieBuy. Usually same as adloc; if it should be different make sure it is included in your EPA.

L. Check Distribution: Usually same as Adloc; if it should be different make sure it is included in your EPA.

4. Section 4 – Rate Information

A. Percent Effort: make sure this matches the funding source lines.

B. Pay Indicator: should match the percent effort & pay cycle for the employee. The following choices are available from the drop down menu:
   A – Monthly Paid; Full Time 100% Budget Position
   B – Monthly Paid; Less than 100% Time Budget Position
   C – Monthly Paid; All Graduate Students except GANTS
   D – Biweekly Paid; Full Time 100% Budget Position
   E – Biweekly Paid; Less than 100% Time Budget Position or Wage Position
   F – Student Title Code Employees

C. Previous Percent Effort: automatically filters in when new iteration is created.

D. Source Control: Defaults to Normal. This allows for dollar amount entry in the funding source lines rather than percentage; we do not recommend its usage as it can cause major problems with future iterations for the pin.

E. FTE Monthly/Hourly Rate: The employees’ current base wage or salary

F. Budgeted Salary: automatically generated by Canopy

G. Previous Monthly/Hourly Rate: automatically filters in when new iteration is created.

H. Previous Budgeted Sal: automatically filters in when new iteration is created.

I. Salary Action: Defaults to Blank – None (no action). You must select a different action anytime the dollar amount is not the same for both FTE Monthly/Hourly Rate and Previous Monthly/Hourly Rate. Your choices include:
   AD Administrative Change. For use only when adding an administrative stipend for Positions with administrative appointments. Written approval is needed; usually For a specific amount of time.
   CE Change Effort
   CF Correction. Normally used during month of September to correct Prep Budget Uploads. Can also be used for other very specific circumstances.
   DE Decrease
**EQ  Equity Increase.** Pay increase for employees who perform similar duties and Responsibilities, possess comparable qualifications, and have a comparable Amount of time in their current position as other staff in the same title. Written Approval is required per President’s Delegation of Authority 11a, 11b, or 11c and University Rule 31.01.01 M7.

**HS  Hiring Salary Adjustment.** An increase that may be given within three months after the end of six months service for newly hired, promoted or reclassified Employees according to University Rule 31.01.01.M7 Section 6.4. Written approval must be attached to the EPA.

**IN  Increase**

**ME  Merit Increase.** Seldom Used; for merit increases not awarded during the Budget cycle. Must route through Dean/Director and Human Resources for VP Approval. A minimum of 6 months must have elapsed since the last merit increase. See university Rule 31.01.01.M7 Section 7

**OA  Other Action.** Too general; try to avoid if possible

**OT  Other Salary Action.** Actions not covered by other more specific choices. One example would be paying a faculty employee a different salary for teaching a summer session than they receive during their normal 9-month term.

**PI  Promotion Increase.** If wage/salary is increased during a pin reclassification, title change action, or when an employee is being promoted into a new pin (position) that has a higher wage/salary than prior position. Budgeted positions will require attachment.

**TS  Temporary Salary Increase.** Used for budgeted positions who meet the Requirements of University Rule 31.01.01.M4. Written approval must be Attached to EPA.

**J. Pay Type:** Defaults to Normal. Select “Biweekly – Insurance (P)” for a wage position that is being filled by an employee actively in a budgeted with benefits position. This will prevent your pin / Adloc from being charged ½ of the employers benefits premiums. An example of the proper use of this pay type would be an employee working 100% as a Business Associate III for the Vet School applying for and being hired into a Wage Task Worker position for athletics, so they can work at Kyle Field during football season. Dual Employment form should be attached to the wage EPA.

**5. Section 5 – Optional Routing**

Leave defaults in place. This is only used if someone in a specific office requires it from you
### 6. Section 6 – Funding Source Lines

<table>
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<tr>
<th>Title Code</th>
<th>Effective Date</th>
<th>Campus</th>
<th>Account Code</th>
<th>Acct Analysis</th>
<th>Pgm Code</th>
<th>Pct Eft</th>
<th>MSO/SP Flags</th>
<th>Monthly Pay Bud. Salary</th>
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These choices are available for each funding line – Edit, Replicate, Delete

A. **Title Code**: Filters in from earlier EPA Field entry; should match title in EPA header

B. **Effective Date**: Filters in from earlier EPA Field entry; should cover the employee through annual term period or they will not be paid.

C. **Campus**: Every TAMU System Member has its own 2 digit code. Main Campus code is “02”. You may need to input a different campus code if other entities such as Engineering, Research or Agrilife are part of the funding.

D. **Account**: Enter six digit account and 5 digit support account. If there is no established support account enter “00000”.

E. **Object Code**: Based on the Title Code. Used for accounting purposes & transfers into FAMIS. See Appendix I for list.

F. **Acct Analysis**: 4-digit Account Analysis code; used by FAMIS to distribute funds. See Appendix II for list.

G. **Pgm Code**: Program Code – used only for research foundation, part 06 and part 28 funding.

H. **Pct Eft**: Percent Effort; what percentage of this source will fund the EPA action.

I. **MSO/SP Flags**: should always be left blank. It is reported by the System office to the state of managerial and supervisory positions on a quarterly basis.

J. **Monthly Pay Bud. Salary**: Filters in as you work on your funding source line(s).

### 7. Validate & Close

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

A. Validating generates net funding; net funding shows the accounting side as it will look in FAMIS.

B. Close EPA Document to route for approval. FAMIS offers an entire class on how to set-up routing and approvals.
8. Other Actions

There are two options if you realize you entered incorrect data, forgot to attach a required form, or need to make other changes to the EPA before it reaches payroll:

A. Recall and Reopen

1. Before the EPA routes to the payroll office, you may recall it out of routing. This action will remove previous approvals.

2. Do a search for “My Documents” to find the EPA you want to recall / reopen.

3. Click on the “Doc ID” number not the Route Doc.

4. Type comments first then click “Recall”. Notice the Doc Status on the right hand side now says “Recalled”. Click “Reopen”, click “Edit” and make your changes.

5. Once reopened, the document must be validated and closed again.

B. Cancel and Void: Should only be done in specific situations; most EPAs can be corrected.
## Appendix I Object Class Codes (FAMIS Codes)

http://payroll.tamu.edu/payroll-processing/tools/

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<thead>
<tr>
<th>OBJECT CODE</th>
<th>SALARIES</th>
<th>OTHER</th>
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<td>EXTENSION – COUNTY AGENTS</td>
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<td>1775 TERMINATION PAY – DEATH BENEFITS</td>
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### Payroll Services

**Accounting Analysis List (in Account Range Order)**

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**Revision Details**

Revised 10/31/2013

Page 1 of 1
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<tr>
<th>CREATE TYPE</th>
<th>DOCUMENT TYPE</th>
<th>RECOMMENDED OCCUPANT ACTION</th>
<th>CURRENT OCCUPANT ACTION</th>
<th>POSITION ACTION</th>
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<tbody>
<tr>
<td>NEW ITERATION FOR THIS PIN (Must enter in PIN)</td>
<td>OCCUPANT CHANGE *Use to place new person in a vacant EXISTING PIN within current FY *Also used for start leave</td>
<td>NEW HIRE TRANSFER IN/PROMOTE IN DEMOTE IN RE-HIRE RETURN FROM LEAVE</td>
<td>ALREADY VACANT (ALWAYS)</td>
<td>OTHER ACTION (usual choice) CHANGE TITLE (if budget pin was reclassified or changing title for wage pin)</td>
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<tr>
<td>NEW ITERATION FOR THIS PIN (Must enter in PIN)</td>
<td>OCCUPANT CHANGE *To terminate, transfer out or retire an employee. *Also used for start leave</td>
<td>MAKE VACANT</td>
<td>RETIRE VOLUNTARY TERM INVOLUNTARY TERM TRANSFER OUT PROMOTE OUT DEMOTE OUT START LEAVE</td>
<td>OTHER ACTION</td>
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<tr>
<td>NEW BUDGETED OR NEW WAGE POSITION</td>
<td>CREATE OR REACTIVATE *To create a BRAND NEW PIN for a newly created position *To reactivate a PIN that did not roll forward to this FY but can be refilled within the 2 years</td>
<td>NEW HIRE TRANSFER IN/PROMOTE IN DEMOTE IN RE-HIRE RETURN FROM LEAVE</td>
<td>ALREADY VACANT (ALWAYS)</td>
<td>CREATE POSITION *New wage or budget position (Generates a NEW PIN#) OR REACTIVATE POSITION *Use old pin &amp; re-establish it in current FY. (NOTE: Type old pin # in box labeled &quot;Reuse Pin&quot;)</td>
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<td>NEW ITERATION FOR THIS PIN (Must enter in PIN)</td>
<td>SOURCE FUNDING CHANGE *Change of account numbers or % between accounts</td>
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<td>NOT APPLICABLE</td>
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<td>NEW ITERATION FOR THIS PIN (Must enter in PIN)</td>
<td>CHANGE SAL., TITLE, PCT EFT, TERM. OR PROMOTE (TERM=Annual Term Months)</td>
<td>CHANGE SALARY, EMPLOYMENT PERIOD, PCT EFT. CHANGE TITLE, PROMOTE WITHIN DEMOTE WITHIN INGRADE PROMOTION RECLASSIFICATION</td>
<td>NOT APPLICABLE (ALWAYS)</td>
<td>CHANGE SALARY OR PCT, EFT, CHANGE TERM OF EMP. CHANGE TITLE OTHER ACTION RECLASSIFICATION</td>
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<tr>
<td>NEW ITERATION FOR THIS PIN (Must enter in PIN)</td>
<td>END OF TERM *Position is originally setup for a certain period of employment (9, 10.5 or 12 mo) terminate at end of period. (5/31; 7/15; or 8/31) Example: retire effective 8/31</td>
<td>END-OF-TERM-No Change</td>
<td>RETIRE VOLUNTARY TERM INVOLUNTARY TERM TRANSFER OUT PROMOTE OUT DEMOTE OUT START LEAVE</td>
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