EPAF Cheat Sheet: Adjustments

Definition of Adjustments (ADJUST): This Cheat Sheet applies to the modification of an active assignment (i.e. salary, FOAP, or title change) with a retroactive date.

Timing: Generally, EPAFs are due about two weeks before the end of a pay period. The Payroll Submission Schedule can be found at: https://myusf.usfca.edu/abs/payroll/pay-schedules. If this EPAF is submitted AFTER the deadline, it will be paid on the next available pay period. For a Special Check request, please contact the Payroll department.

Contact Information for EPAF Support: HRIS@usfca.edu

Required Steps/Actions

1. Go to Employee tab of My USF > Employee Self-Service, select EPAFs, then select New EPAF and enter employee’s CWID.

2. Define Employee, Jobs Effective Date and Approval Category.

3. Use the first date of the next available payroll (respective to the given employee assignment being adjusted) as the Jobs Effective Date unless you are creating an additional assignment with a retro date.

4. From the Approval Category menu, select “Adjustments, ADJUST” and click “Go.”

5. Select the Position Number and Suffix that is to be modified.

6. Enter Main Job information.

Fields:

- **Job Begin Date** field. If there is a prepopulated date value already in the field, leave this date as-is. If the field is blank, then enter date of the next available payroll in the Job Begin Date field UNLESS you are creating an assignment with a retro date, then you would use the first date of the payroll they started.
- **Jobs Effective Date** is the first date of the next available payroll unless you are
creating an assignment with a retro date then you would use the date of when they first started.

- **Personnel Date** is the actual date the retro action was effective.
- Enter any new values in any of the following fields if there is a change from the *Current Value*: **Home Organization, Distribution Org, Employee Status, Employee Class Code, Assignment Type, Step, Regular Rate, Annual Salary, FTE, Appointment Percent, Factor, Pays, Title, Unit Equivalency, or Hours Per Pay**. Enter all the fields relevant if you are creating a retro dated assignment.

7. Select the **Job Change Reason** appropriate to the type of adjustment change you are requesting:

   - **RETO** – **Retroactive** adjustment with no change to pay (e.g. Title, Units, Hours)
   
   - **RETCWP** – **Retroactive** pay-related adjustment (e.g. annual salary, pay rate, FTE, factor/pay changes).
   
   - **SALAD** - Adjusting annual salary on assignments **Going Forward**. Annual salary field must be the **Balanced owed** to the employee. Factor and Pays must be updated to include the **remaining pay periods** based on contract end date.
   
   - **REDIS**- **FOAP** **Redistribution** only.
   
   - **ZACAA**- ACA hours adjustment - **Adjustment** of ACA hours only
8. Verify and/or update FOAP information.

9. Define **Approval Routing Queue.** Enter the designated EPAF approvers in the **Routing Queue** section, as follows:

   *Please note to manually enter the level for Grants if this is a Grant Funded position.

<table>
<thead>
<tr>
<th>Level</th>
<th>Approver</th>
</tr>
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<tbody>
<tr>
<td>20 – DEPMGR</td>
<td>(Determined by department)</td>
</tr>
<tr>
<td>30 – DIVAPR</td>
<td></td>
</tr>
<tr>
<td>40 – HREMP</td>
<td>MENCISO2</td>
</tr>
<tr>
<td>90 – HRIS</td>
<td>TAKAHASHI</td>
</tr>
<tr>
<td>99 – FINPAY</td>
<td>TAKAHASHI</td>
</tr>
</tbody>
</table>

10. Add **Comments,** including cause for the retro action and all relevant details.

11. Click on **Save** and then **Submit.**

12. Once the EPAF has been successfully submitted, monitor your e-mail for confirmation that your EPAF has been “Completed Successfully.” If you receive an e-mail notification that the EPAF has been “Returned for Correction,” revisit the EPAF in your **EPAF Originator Summary,** make the correction(s) specified in the **Comments** section, then **Save** and resubmit.