

Fellows in ePAF

This instruction guide consists of 4 instructions:

1. Hiring a new Pre- or Post-Doc Fellow (pages 2–4)
2. Reappointing a Pre- or Post-Doc Fellow (page 5)
3. Terminating a Pre- or Post-Doc Fellow (page 6)
4. Rehiring a Pre- or Post-Doc Fellow (pages 6-7)

Note: Paperwork for all Fellowships on **NIH Grants** must go to Lisa Yates at Contracts & Grants, 123 Grinter Hall (telephone 352-273-3126) for all types of actions before the relevant ePAF can be prepared. The completed and signed C&G approval form must be submitted with the ePAF through document fax imaging.

Note: Fellowship appointments must be awarded through the UF payroll system and must conform to the published academic year calendar dates.

Calculating and entering payments

Fellowship payments can be paid bi-weekly, quarterly, or as one payment (lump sum). If you are paying quarterly, or as a one-time payment throughout the academic year, then you should make a calendar note to **prepare an Additional Pay ePAF at the beginning of each pay period in which the payment is due**, as myUFL does not automatically calculate when each payment is due.

Bi-weekly payments example

Total pay for the appointment = \$2000

Bi-weekly payment is therefore $\$2000 \div 26.1^*$ pay periods = **\$76.63** (round-up)

Enter for each payment:

Earnings amount = \$76.63

Goal amount = \$2000

*this may change according to the number of pay periods within the Fellow appointment

Quarterly payments example

Total pay for the appointment = \$2000

Quarterly payment is therefore $\$2000 \div 4$ payments = **\$500** (round-up)

Enter for each payment:

Earnings amount = \$500

Goal amount = \$500 (note the total pay amount is not used for quarterly payments)

Lump sum payment example

Total pay for the appointment = \$2000

Lump sum payment is therefore **\$2000**

Enter as a one-time payment only:

Earnings amount = \$2000

Goal amount = \$2000

Catch-Up payment example

2 ePafs must be entered:

- 1) A LSP Catch-up will be effective when fellowship starts.
 - a. Earnings Amt: The amount needed to be paid to be caught up through current pay period
 - b. Goal Amt: same as earnings amount
- 2) An Additional Pay ePAF to be effective the beginning of the next pay period
 - a. Earnings Amt: regular biweekly amount
 - b. Goal Amt: Total fellowship amount minus the LSP already entered

Security Roles

You will need one of the following security roles to perform the actions described in this guide:

- ✓ The Originator security roles
UF_EPAF_Department Admin and UF_HR View/Inquiry
- ✓ The Level 1 Approver security roles
UF_EPAF_Level 1 Approver and UF_HR View/Inquiry

You must attend PST210 Hiring & Additional Pay class before you can receive these security roles.

1. HIRING A NEW PRE- OR POST-DOC FELLOW

To hire a new pre-or post-doc Fellow, use the **Hire an Employee** ePAF and select the appropriate salary plan/job code combination within this form to trigger additional pay. When you choose one of these salary plan/job code combinations, the **Hire an Employee** ePAF prompts you to fill out additional pay details instead of a compensation rate.

Navigation

- ▶ Log in to myUFL (<http://my.ufl.edu>)
- ▶ Navigate to **Nav Icon > Main Menu > Human Resources > UF Departmental Administration > ePAF Home Page**
- ▶ At the ePAF Home Page click **Start a New ePAF**
- ▶ Click **Hire an Employee**

Note: When hiring and/or providing additional pay to foreign nationals, additional paperwork is required. See note below about paperwork, attend PRO316 Nonresident Alien Training, and/or contact Payroll & Tax Services for further information.

Search

Use the first page of the **Hire an Employee** form to search the UF Directory for the individual you are hiring. If you locate the individual, you will hire him or her under their existing UFID. If you do not locate the individual, you need to enter the personal details and the system will automatically assign a UFID and will prompt you to add him or her to the directory. You can then continue with the hire.

- ▶ Do you know the UFID for the person you are hiring?

- ▶ **YES**
- ▶ Enter the person's UFID into the **UFID** field
- ▶ Click **Search**

- ▶ **NO**
- ▶ Type the person's last name into the **Last Name** field. This must be entered exactly as it is spelled
- ▶ Click **Search**

- ▶ *Do your search results include the person you are hiring?*

▶ **YES**

- ▶ Click icon ▶ to select the person you are hiring
- ▶ Ensure you select the appropriate employee record (if more than one)

▶ **NO**

- ▶ Enter the person's **First Name, Last Name, Date of Birth,** and **Social Security #** into the fields provided
- ▶ Click **Search**
- ▶ If this search locates the person in the UF Directory click the icon ▶ to select that person. Ensure you select the appropriate employee record (if more than one)

- ▶ If this search does not locate the person in the UF Directory an **Add** button will appear on the screen. Click **Add** to enter personal details and obtain a UFID, which will add the individual to the UF Directory

Personal Info Section (if the search does not locate the person in the UF Directory)

- ▶ In the **Personal Info** section you will see the ID has been assigned. The First and Last Name has been populated from your original search
- ▶ Enter the **Hire Effective Date** (the date the Fellow started work)
- ▶ Add **Middle Name,** any **Suffix** and **Email Address**

- ▶ In the **Home Address & Phone** section
 - ▶ Enter **Address 1, Address 2, City, State, Postal Code**
 - ▶ Enter **County** (you can use the magnifying glass to look up)
 - ▶ Enter **Phone Number**

- ▶ In the **Business Address & Phone** section enter the UF business address (typically a PO Box)
 - ▶ Enter **Address 1, Address 2, City, State, Postal Code**
 - ▶ Verify the **County** (you can use the magnifying glass to look up)
 - ▶ Enter the business **Phone Number**

- ▶ In the **Mailing Address & Phone** section enter the mailing address (must be a US address)
 - ▶ Enter **Address 1, Address 2, City, State, Postal Code**
 - ▶ Enter **County** (you can use the magnifying glass to look up)
 - ▶ Enter **Cell Phone Number** if known
 - ▶ Click **Next**

Identity Info section

- ▶ Select the **Gender** from the drop-down list
- ▶ Verify the individual's **Date of Birth** and **Social Security #**
Important: If the social security number is wrong, stop! You may be hiring the wrong person. Either go back to select the appropriate person, or call your core office for assistance
- ▶ Select the **Marital Status** from the drop-down list
- ▶ Select the **Citizenship Status** from the drop-down list
- ▶ Select the **Highest Education Level** from the drop-down list
- ▶ Click **Save & Next**
- ▶ Click **Yes**

Hire Form Data Section

- ▶ Enter the **Effective Date**. The effective date for fellows should be the day the appointment begins
- ▶ The **Salary Plan** for pre- and post-doc fellows is **FELL**
- ▶ Use drop down to select **Empl Class**.
 - Select **Fellow** for Pre Doc Fellow
 - Select **Post Doc Fellow** for Post Doc Fellow
 - Select **Regular** only as needed.
- ▶ **Work County** defaults to **ALACHUA**. Change if necessary
- ▶ The **FICA Status** should be **Exempt**
- ▶ Click **Next**
- ▶ Enter the **Job Code** to reflect whether the fellowship is pre- or post-doctoral
 - ▶ 000395 POSTDOC FELLOWSHIP
 - ▶ 000396 PREDOC FELLOWSHIP
- ▶ Enter your department in the **Department** field
- ▶ In the **Std Hrs/Wk** field enter **0.05** and tab or click out
Note: Fellows do not have an FTE. Entering .05 in Standard Hours field allows the system the register an entry in the required field but keeps the FTE at 0.
- ▶ Click **Next**
Enter the **Earnings Code**:
FEL = US citizen*
N15 = Foreign national
*(includes foreign student with W-9)
Always use the correct earnings code for foreign students. Using an incorrect earnings code can cause the student to owe money at the end of the year!
- ▶ Enter the **Reason Code**:
FUS = Pre-Doc Fellowship
FTH = Pre-Doc Fellowship/NIH training grant
FLT = Post-Doc Fellowship
FTG = Post-Doc Fellowship/NIH training grant
- ▶ Fellowship payments can be paid bi-weekly, quarterly, as one payment (lump sum), or in a "Catch-Up" payment. Enter the appropriate **Earnings Amount** and **Goal Amount** as shown in the example on page 1 of this instruction guide
- ▶ Click **Next**
- ▶ Enter reason for the payment in **Comments Section** - **this is important as it will assist the approval process**
- ▶ Make a note of the **eForm ID** number for your records. This will make it easier to find later if needed
- ▶ Click **Submit** button
- ▶ Click **Yes** to submit the ePAF for Level 1 Approval

Note: If the additional payment is for someone outside your department you will need to complete a payroll distribution using the appropriate Earnings Account Code(s). If the additional payment is for someone inside your department, a distribution is not necessary unless you are using a different Earnings Account Code.

Paperwork

- ▶ Appropriate paperwork should be attached to the ePAF via Document Fax Imaging (instruction guide located at <https://learn-and-grow.hr.ufl.edu/toolkits-resource-center/human-resources-toolkits/hiring-and-additional-pay/>).
- The paperwork includes:

- ▶ Fellowship Memorandum of Understanding (see <http://hr.ufl.edu/wp-content/uploads/forms/academic/fellowshipmemo.pdf>)
 - ▶ Four in One Form
 - ▶ Direct Deposit Form

Additional required paperwork for Foreign Nationals

- ▶ I-20 (F1 Visa) or DS-2019 (J1 Visa)
- ▶ Foreign National Information Form and attachments (Windstar)
- ▶ W-8 Ben or W-9 from Tax Services
- ▶ I-94 (front and back)

2. REAPPOINTING A PRE- OR POST-DOC FELLOW

Use the Add Additional Pay ePAF to reappoint a pre- or post-doc Fellow. A Fellowship stipend can only be continued for a new academic year if the Fellow has an active job record in job data. **If the job record has been terminated, please follow the instructions as for 1. Hiring a New Pre- or Post Doc Fellow above.**

Navigation

- ▶ Log in to myUFL (<http://my.ufl.edu>)
- ▶ Navigate to **UF Departmental Administration > ePAF Home Page**
- ▶ On the ePAF Home Page click **Start a New ePAF**
- ▶ Click **Add Additional Pay**
- ▶ You can search for the Fellow using any of the fields shown. Click **Search**. Select the Fellow (ensure you select the appropriate employee record, if more than one).
- ▶ Enter the **Effective Date** which should be the start date for the reappointment
- ▶ Enter the **Earnings Code**:
 - FEL** = US citizen*
 - N15** = Foreign national
- * (includes foreign student with W-9)
Always use the correct earnings code for foreign students. Using an incorrect earnings code can cause the student to owe money at the end of the year!
- ▶ Enter the **Reason Code**:
 - FUS** = Pre-Doc Fellowship
 - FTH** = Pre-Doc Fellowship/NIH training grant
 - FLT** = Post-Doc Fellowship
 - FTG** = Post-Doc Fellowship/NIH training grant
- ▶ Fellowship payments can be paid bi-weekly, quarterly, as one payment (lump sum), or in a "Catch-Up" payment. Enter the appropriate **Earnings Amount** and **Goal Amount** as shown in the example on page 1 of this instruction guide
- ▶ Click **Next**
- ▶ Enter reason for the payment in **Comments Section** - **this is important as it will assist the approval process**
- ▶ Make a note of the **eForm ID** number for your records. This will make it easier to find later if needed
- ▶ Click **Submit** button
- ▶ Click **Yes** to submit the ePAF for Level 1 Approval

Paperwork

- ▶ Appropriate paperwork should be attached to the ePAF via Document Fax Imaging (instruction guide located at <http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits/hiring-and-additional-pay/>)
The paperwork includes:

- ▶ Fellowship Memorandum of Understanding (see <http://hr.ufl.edu/wp-content/uploads/forms/academic/fellowshipmemo.pdf>)

Additional required paperwork for Foreign Nationals

- ▶ I-20 (F1 Visa) or DS-2019 (J1 Visa)
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- ▶ W-8 Ben or W-9 from Tax Services
- ▶ I-94 (front and back)

3. TERMINATING A PRE- OR POST-DOC FELLOW

Use the Change Employment Status ePAF to terminate the Fellow. **Prepare the ePAF only after the final fellowship payment has been made.**

Note: To stop a fellowship payment prior to the end of the goal amount, contact HR Services at 352-392-2477 for assistance.

Navigation

- ▶ Log in to myUFL (<http://my.ufl.edu>)
- ▶ Navigate to **UF Departmental Administration > ePAF Home Page**
- ▶ On the ePAF Home Page click **Start a New ePAF**
- ▶ Click **Change Employment Status**
- ▶ You can search for the employee using any of the search fields shown. Click **Search**.
- ▶ **Select** the Fellow (ensure you select the appropriate employee record, if more than one).
- ▶ The **Effective Date** is the day after the last day of the semester.
- ▶ Click the **Action** drop down list. Select **Terminatn**.
- ▶ Click the **magnifying glass** to look up the Reason. Select **Terminate add'l pay/lump sum**.
- ▶ In the **Comments** section, add comments to assist the approval process which must include the note **'Fellowship stipend has paid out'**.
- ▶ Make a note of the **eForm ID** number for your records. This will make it easier to find later if needed
- ▶ Click **Submit** button
- ▶ Click **Yes** to submit the ePAF for Level 1 Approval

Paperwork

- ▶ No paperwork is required for terminations

4. REHIRING A PRE- OR POST-DOC FELLOW

To process a rehire for a Fellow who has been previously terminated, use the **Hire an Employee ePAF**.

Navigation

- ▶ Log in to myUFL (<http://my.ufl.edu>)
- ▶ Navigate to **UF Departmental Administration > ePAF Home Page**
- ▶ On the ePAF Home Page click **Start a New ePAF**
- ▶ Click **Hire an Employee**
- ▶ You can search for the Fellow using any of the fields shown. Click the **Search** button
- ▶ Select the **Fellow**. Ensure you use the appropriate employee record (if more than one)

Hire Form Data Section

- ▶ Enter the **Effective Date**. The effective date for Fellows should be the day the appointment begins
- ▶ The **Salary Plan** for pre- and post-doc fellows is **FELL**

- ▶ Use drop down to select **Empl Class**.
 - Select **Fellow** for Pre Doc Fellow
 - Select **Post Doc Fellow** for Post Doc Fellow
 - Select **Regular** only as needed.
- ▶ **Work County** defaults to ALACHUA. Change if necessary
- ▶ The **FICA Status** should be **Exempt**
- ▶ Click **Next**
- ▶ Enter the **Job Code** to reflect whether the fellowship is pre- or post-doctoral
 - ▶ **000395 POSTDOC FELLOWSHIP**
 - ▶ **000396 PREDOC FELLOWSHIP**
- ▶ Enter your department in the **Department** field
- ▶ In the **Std Hrs/Wk** field enter **0.05** and tab or click out
Note: Fellows do not have an FTE. Entering .05 in Standard Hours field allows the system the register an entry in the required field but keeps the FTE at 0
- ▶ Click **Next**
- ▶ Enter the **Earnings Code**:
FEL = US citizen*
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Always use the correct earnings code for foreign students. Using an incorrect earnings code can cause the student to owe money at the end of the year!
- ▶ Enter the **Reason Code**:
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- ▶ Fellowship payments can be paid bi-weekly, quarterly, as one payment (lump sum), or in a "Catch-Up" payment. Enter the appropriate **Earnings Amount** and **Goal Amount** as shown in the example on page 1 of this instruction guide
- ▶ Click **Next**
- ▶ Enter reason for the payment in Comments Section - this is important as it will assist the **approval process**
- ▶ Make a note of the **eForm ID** number for your records. This will make it easier to find later if needed
- ▶ Click **Submit** button
- ▶ Click **Yes** to submit the ePAF for Level 1 Approval

Paperwork

- ▶ Appropriate paperwork should be attached to the ePAF via Document Fax Imaging (instruction guide located at <http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits/hiring-and-additional-pay/>)
The paperwork includes:
 - ▶ Fellowship Memorandum of Understanding (see <http://hr.ufl.edu/wp-content/uploads/forms/academic/fellowshipmemo.pdf>)
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- Additional required paperwork for Foreign Nationals**
- ▶ I-20 (F1 Visa) or DS-2019 (J1 Visa)
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 - ▶ W-8 Ben or W-9 from Tax Services
 - ▶ I-94 (front and back)

Additional Help

Academic Personnel	352-392-2477
UF Payroll & Tax Services	352-392-1324
UF Help Desk (for Technical Issues)	32-392-HELP (4357) email: helpdesk@ufl.edu

Training: **PRO318 Hiring Graduate Assistants and Fellows**

Further resources available at <http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits/>