BANNER
ELECTRONIC PERSONNEL ACTION FORM

TRAINING
MANUAL

SUBR|Southen University A&M College

TABLE OF CONTENTS

Introduction

Definition of an EPAF

An Electronic Personnel Action Form (EPAF) Banner Form located in Self Service Banner used for routing and approval for changes to an employee or their respective job information. EPAFs can be used to process new hires, additional jobs, salary adjustments, transferring an employee from one department to another, and for organizational changes.

Every job change must be approved on multiple levels. All EPAFs require department and division approval. Each EPAF is assigned an "Approval Category" which determines the required levels of approval. Lastly, the EPAF is applied to the employee's job record once all levels of approval have been completed. If there are any issues with the EPAF, the designated Approver can select "Return for Correction" and require the originator to correct or recreate the EPAF.

The EPAF must be completed, approved, and applied in a TIMELY manner so the employees' job record can be updated. TIMELY completions of EPAFs are very essential to help the Payroll Department pay an employee accurately and on time.

In order to be given EPAF access a request must submitted to the Office of Human Resources by the individual requesting access.

Terms and Definitions

1. **EPAF** – an Electronic Personnel Action Form which allows users to process actions electronically, without paper, by submitting changes to information on the General Person, Employee and NBAJOBS forms in Banner.

2. **Originator** – The Originator initiates the data entry of the EPAF personnel transaction and submits it to the first level in the routing queue.

3. **Approver** – The Approver reviews the EPAF personnel transaction submitted by the originator to ensure that data entry is complete and accurate, and to verify that supporting documentation requirements are met.

4. **FYIer** – The FYIer receives a copy of the EPAF personnel transaction to review. This serves only as an "FYI" for the recipient – he or she cannot take action on the transaction.

5. **Applier** – The Applier "routes", or applies the EPAF transaction into the Banner database.

6. **Routing Queue** – The sequence of Approvers and FYIers each EPAF must pass through before being applied to the Banner database.

7. **Required Action** – The action the designated Approver is required to take. This is defined for each level or step in the Routing Queue.

8. **Waiting** – The EPAF is in the process of being created and has not yet been submitted. An EPAF in "WAITING" status can be deleted by the Originator by selecting the Delete button on the EPAF form.

9. **Pending** – The EPAF is in the Routing Queue and requires action by the Approver(s).

10. **Returned for Correction** – The EPAF has been returned to the Originator for correction. The EPAF can then be corrected by the Originator and resubmitted. Once an EPAF is in Return for Correction status, it is as if it were never submitted.

11. **Approved** – The EPAF has been approved by all of the Approvers in the Routing Queue, but it has not yet been applied to the database.

12. **Complete** – The EPAF has been applied to the database and the requested changes have been made in Banner.

13. **Disapproved** – The EPAF has been disapproved by an Approver. The other Approvers in the Routing Queue (after them) no longer need to take action. The EPAF was stopped.

14. **In the Queue** – The EPAF is on its way to you as an Approver but it needs action at a lower level. The status changes to Pending when the transaction reaches you.

15. **Acknowledge** - An Approver designated with the action of FYI has seen the EPAF.

16. **Void** – The Originator has voided the EPAF. It is no longer a valid transaction. The Originator can Void the EPAF at any time during the approval process.

17. **Removed for the Queue** – The EPAF has either been voided by the Originator or Disapproved by an Approver. The EPAF is no longer a valid transaction. This is the Queue status the remaining Approver will see.

18. **Overridden** - A Superuser has approved an EPAF, prior to receiving all approvals from those defined in the approval queue. In this case, the Queue Status would read "Overridden" for all Approvers remaining in the Routing Queue that the EPAF has not reached.

    a. A superuser has the ability to approve any transaction at any time during the approval process and bypass the people in the approval queue that have not yet taken action on the transaction.

19. **Applied** – The EPAF has been applied to the database. The new data can be verified/viewed in the Banner forms and tables.

20. **More Information** – If the Approver needs more information before they can take action, they can change the status to More Information to let others in the Routing Queue know that they are working on it.

PLEASE LOG-IN TO SANDBOX

1. ACCESS SU BANNER WEBSITE [BANNER.SUBR.EDU]

2. CLICK ON "SANDBOX"

3. CLICK ON "SELF-SERVICE BANNER SANDBOX [SSB]"

Southern University Banner Links Page

PRODUCTION LINKS

Internet Native Banner [PROD-INB]

Self Service Banner [PROD-SSB]

Evisions Server Production

(Intellicheck/FormFusion/Argos)

SANDBOX LINKS (TESTING 11g)

Internet Native Banner [SANDBOX-INB]^{11g}

Self Service Banner [SANDBOX-SSB]

Evisions Server Sandbox

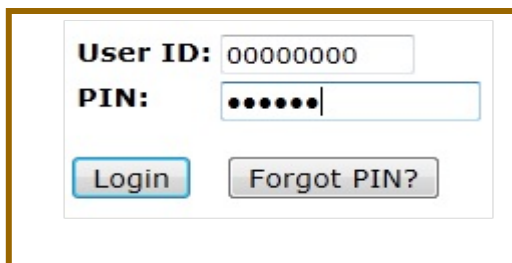(Intellecheck, Formfusion, Argos)

CLICK HERE

(PLEASE NOTE SANDBOX IS THE TRAINING ENVIRONMENT FOR BANNER, ANYTHING ENTERED & SUBMITTED WILL NOT BE RECORDED)

EPAFs for Civil Service Assignments (HIRE20)

Step 1: Log into Banner Web

- ➢ *Click* on the link **"Enter Secure Area"**
- ➢ *Click* in the **User ID** box
- ➢ *Type* your **User ID (9 digit S-Number)**
- ➢ *Click* in the **PIN** box or *Press* the Tab key
- ➢ *Type* your **PIN (In Training Your PIN will be "123456")**
- ➢ *Click* on **"Login"** or *Press* Enter

Step 2: Access the Employee Information Menu
- ➢ *Click* on the link **"Employee"** tab on the Main Menu

Step 3: Access the Electronic Personnel Action Forms Menu
> Click on the link **"Electronic Personnel Action Form"**
> Click on the link **"New EPAF"**

The following describe the steps required in order to originate and submit an EPAF for Civil Service Assignments:

Personal Information	Student	Financial Aid	Employee

Search [____] Go

RETURN TO MENU   SITE MAP   HELP   EXIT

Employee

Time Sheet
Electronic Personnel Action Forms
Benefits and Deductions
Retirement, health, flexible spending, miscellaneous, beneficiary, benefits enrollment, Benefit Summary.
Pay Information
Direct deposit allocation, earnings and deductions history, or pay stubs.
Tax Forms
W4 information, W2 Form.
Leave Balances
Campus Directory

RELEASE: 8.9

ID

Start by searching for the employee for whom the EPAF is being created for. If the person is already an employee of the University, type his or her S-Number into the ID field. If it is not known that the person is an employee, then search the employee database.

Person Search

☐ Check the box to limit the search to an Employee. Enter the Last Name and or First Name, or wildcard.

Search Criteria
Employee: ☐
Last Name: [_____]
First Name: [_____]
Or

ID: [_____]
Or

SSN/SIN/TIN: [_____]

To search the employee database, click on the magnifying glass icon [🔍], check the "Employee" box, and enter identifying information about the person. If the person is an employee the search will return results. If the person is not defined as an employee, complete..............

APPROVAL CATEGORY

There are several types of EPAFs. The body of the EPAF populates based upon the selected Approval Category. The Approval Category also determines which levels are required for EPAF approval.

Select the appropriate **Approval Category** from the drop down menu:

Step 2: Job Selection

In this step, the job is identified. The EPAF either creates a new job or modifies an existing job. Type in a new position number and suffix if the EPAF creates a brand new assignment for the employee. If the position number is unknown, click on the magnifying glass icon to search.

The position number connects the job to the budgeted FOAP. In most cases, each job has its own unique position number. Nevertheless, multiple employees can have jobs under a shared or pooled position number if these employees are part-time, on the same payroll, and are paid out of the same FOAP.

The suffix differentiates one job from another within the same position number. The EPAF user assigns the suffix - this is not automatically populated. When assigning a suffix, keep in mind that Banner suffixes are double digit beginning with 00 through 99. It is recommended that the user assign a suffix with the lowest number in the range as possible. Most staff employees have exactly one job, so the newly assigned suffix should likely be 00.

Step 3: Main Job Information

Step 3 populates many fields for data entry depending on the Approval Category selected in Step 1.

Create New Employee Record

Item	Current Value	New Value	
Employee Class Code: ☐	MU, Monthly Unclassified	🔍	
Employee Status: (Not Enterable)	Terminated	A	
Home COAS: ☐(Not Enterable)	C	C	**The Home Organization is the Budget Code**
Home Organization: ☐	11401, Off of the VP for Human Resources 🔍		
Current Hire Date: MM/DD/YYYY☐	02/13/2012	10/14/2013	
Original Hire Date: MM/DD/YYYY	02/13/2012		
Adjusted Serv. Date: MM/DD/YYYY	01/13/2001		
First Work Date: MM/DD/YYYY	02/13/2012		

Create a New Hourly Job, 1B9984-00 Admin Asst 4

Item	Current Value	New Value	
Job Begin Date: MM/DD/YYYY☐		10/14/2013	
Jobs Effective Date: MM/DD/YYYY☐		10/14/2013	
Personnel Date: MM/DD/YYYY			
Contract Type: ☐		Primary ▼	
Title:			
Regular Rate: ☐			**Enter Hourly Rate**
Step: ☐(Not Enterable)		0	
Job Change Reason: ☐(Not Enterable)		10000	

Step 4: Labor Distribution/FOAP

Step 4 determines how the labor for this position will be charged within Business & Finance. The FOAP is a four part numeric sequence that includes a **Fund**, **Organization**, **Account**, and **Program** number.

New
Effective Date: MM/DD/YYYY 08/27/2013

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance
C		111008	11401	61002	16000					100.00	
										Total: 100.00	

The FOAP populates based upon the Position Number indicated in Step 2. Confirm that the FOAP is correct. If the reason for the EPAF is to initiate a change in the FOAP, type the correct FOAP here. If the position should be charged to multiple FOAPs, type in each FOAP and appropriate percentage. The sum of all percentages must total 100%.

Step 5: Routing Queue

Step 5 determines the individuals who approve the EPAF.

Routing Queue

Approval Level	User Name		Required Action
99 - (APPLY) EPAF Applier	EWASHIN	Ethel R. Washington	Apply
1 - (HRREVW) HR Review	KADRICA_TILLOTSON	Kadrica D Tillotson	Approve
10 - (BUDGET) Budget Office	JONESPAM	Pamela D Jones	Approve
80 - (VCHANC) Vice Chancellor	ROSTAY	Rosie J Taylor	Approve
Not Selected			Not Selected

Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

All possible Approval Levels include:
➢ **HR Review**
➢ **Budget Office**

- ➢ **SUBR Level 1**
- ➢ **SUNO Level 1**
- ➢ **SUSLA Level 1**
- ➢ **SUS Chancellors**
- ➢ **SUS President**
- ➢ **Budget Approvers for Grants**
- ➢ **Financial Aid Approvers of EPAFs**
- ➢ **Graduate School Approvers**
- ➢ **College Work Study Approvers**
- ➢ **SUS Vice Chancellors**
- ➢ **College Work Study Appliers**
- ➢ **EPAF Applier**

Use the Magnifying glass search icon to select the most appropriate approver from the available users.

These are three possible Required Actions

Approve - The individual is required to "approve" the EPAF. The EPAF cannot be approved at a higher level until it is approved at the lower levels.

Apply- Only an individual at the Human Resources level can "apply an EPAF. This is the action that occurs when an EPAF is converted into a jobs record in the payroll system. Always select the same individual who approves an EPAF at the Human Resources Level to Apply the EPAF.

FYI- An EPAF originator can select additional individuals at different levels to "FYI" or "acknowledge" the EPAF. Unlike the required action to "approve," an EPAF can be approved and applied at higher levels if the

Step 6: Comment

The comment field allows the EPAF Originator to input any text to add information and clarification to the EPAF. Include any other pertinent details about the EPAF in the comments. For example, if employee is assuming a new position, an Originator may include the start date of their position, who they are replacing, and what position they are leaving. Originators may enter union status in comments as well.

> **NOTE:** Once comments are "saved," they cannot be changed. Be careful with articulating comments. An EPAF user can make multiple comments to the EPAF, and comments can be attached to the EPAF at any approval level.

Step 7: Save & Submit

To complete the EPAF, click **Save then Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

ERROR: Error messages

WARNING: Warning messages simply deliver information, and still allow the EPAF to progress successfully. Usually, warning messages inform the originator, approvers, and payroll department about budget issues associated with the job.

EPAFs for Faculty Assignments (HIRE50)

Step 1: New EPAF Person Selection

New EPAF Person Selection

☐ Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

☐ - indicates a required field.

ID: ☐ S01517956   Kanetra S Tillotson   🔍

Query Date: MM/DD/YYYY ☐ 11/01/2013
Approval Category: ☐   Hire Full-Time Faculty, HIRE50   ▾
[Go]
☐ There are no active jobs based on the Query Date.
[All Jobs]

CLICK "GO"

ID

Start by searching for the employee for whom the EPAF is being created for. If the person is already an employee of the University, type his or her S-Number into the ID field. If it is not known that the person is an employee, then search the employee database.

Person Search

☐ Check the box to limit the search to an Employee. Enter the Last Name and or First Name, or wildcard.

Search Criteria
Employee: ☐
Last Name: _____
First Name: _____
  Or

ID: _____
  Or

SSN/SIN/TIN: _____

To search the employee database, click on the magnifying glass icon 🔍, check the "Employee" box, and enter identifying information about the person. If the person is an employee the search will return results. If the person is not defined as an employee…………..

APPROVAL CATEGORY

There are several types of EPAFs. The body of the EPAF populates based upon the selected Approval Category. The Approval Category also determines which levels are required for EPAF approval.

Select the appropriate Approval Category from the drop down menu

New EPAF Person Selection

☐ Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

☐ - indicates a required field.

ID: ☐ [   ] Kanetra S Tillotson [   ] 👫 🔍

Query Date: MM/DD/YYYY ☐ 11/01/2013

Approval Category: ☐ Hire Full-Time Faculty, HIRE50 ▼

[Go]

☐ There are no active jobs based on the Query Date.

[All Jobs]

Step 2: Job Selection

In this step, the job is identified. The EPAF either creates a new job or modifies an existing job.

Type in a new position number and suffix if the EPAF creates a brand new assignment for the employee. If the position number is unknown, click on the magnifying glass icon 🔍 to search.

New EPAF Job Selection

☐ Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: Kanetra S Tillotson, [   ]
Query Date: Nov 01, 2013
Approval Category: Hire FT Faculty, HIRE50

Create a New Full-Time Faculty Job, JOBS03

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job	2F9468	05	Associate Professor	22477, Computer Science					⦿

☐ There are no active jobs based on the Query Date.

[All Jobs]

[Next Approval Type] [Go]   **CLICK "GO"**

The position number connects the job to the budgeted FOAP. In most cases, each job has its own unique position number. Nevertheless, multiple employees can have jobs under a shared or pooled position number if these employees are part-time, on the same payroll, and are paid out of the same FOAP.

The suffix differentiates one job from another within the same position number. The EPAF user assigns the suffix - this is not automatically populated. When assigning a suffix, keep in mind that Banner suffixes are double digit beginning with 00 through 99. It is recommended that the user assign a suffix with the lowest number in the range as possible. Most staff employees have exactly one job, so the newly assigned suffix should likely be 00.

Step 3: Main Job Information

Step 3 populates many fields for data entry depending on the Approval Category selected in Step 1.

Create New Employee Record

Item	Current Value	New Value
Employee Class Code: ☐	GA, Graduate Assistant Faculty 🔍	FM
Employee Status: (Not Enterable)	Active	A
Home COAS: ☐(Not Enterable)	C	C
Home Organization: ☐	22477, Computer Science 🔍	22477
Current Hire Date: MM/DD/YYYY☐	01/21/2010	11/01/2013
Original Hire Date: MM/DD/YYYY	01/21/2010	
Adjusted Serv. Date: MM/DD/YYYY	01/21/2010	
First Work Date: MM/DD/YYYY	01/21/2010	

The Home Organization is the Budget Code

Create a New Full-Time Faculty Job, 2F9468-05 Associate Professor

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY☐		11/01/2013
Jobs Effective Date: MM/DD/YYYY☐		11/01/2013
Personnel Date: MM/DD/YYYY		
Contract Type: ☐		Primary
Title:		Associate Professor
Annual Salary: ☐		68000
Deferred Pay Code:		Not Selected
Factor:		12.0
Pays:		12.0
Step: ☐(Not Enterable)		0
Job Change Reason: ☐(Not Enterable)		10000

Enter Annual Salary Amount

Step 4: Labor Distribution/FOAP

Step 4 determines how the labor for this position will be charged within Business & Finance. The FOAP is a four part numeric sequence that includes a Fund, Organization, Account, and Program number.

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance
C		111008	11401	61002	16000					100.00	
										Total:	
										100.00	

New
Effective Date: MM/DD/YYYY 08/27/2013

The FOAP populates based upon the Position Number indicated in Step 2. Confirm that the FOAP is correct. If the reason for the EPAF is to initiate a change in the FOAP, type the correct FOAP here. If the position should be charged to multiple FOAPs, type in each FOAP and appropriate percentage. The sum of all percentages must total 100%.

Step 5: Routing Queue

Step 5 determines the individuals who approve the EPAF.

Approval Level	User Name		Required Action
99 - (APPLY) EPAF Applier	EWASHIN	Ethel R. Washington	Apply
1 - (HRREVW) HR Review	KADRICA_TILLOTSON	Kadrica D Tillotson	Approve
10 - (BUDGET) Budget Office	JONESPAM	Pamela D Jones	Approve
80 - (VCHANC) Vice Chancellor	ROSTAY	Rosie J Taylor	Approve
Not Selected			Not Selected

Routing Queue

Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

All possible Approval Levels include:
- ➢ **HR Review**
- ➢ **Budget Office**

- ➢ **SUBR Level 1**
- ➢ **SUNO Level 1**
- ➢ **SUSLA Level 1**
- ➢ **SUS Chancellors**
- ➢ **SUS President**
- ➢ **Budget Approvers for Grants**
- ➢ **Financial Aid Approvers of EPAFs**
- ➢ **Graduate School Approvers**
- ➢ **College Work Study Approvers**
- ➢ **SUS Vice Chancellors**
- ➢ **College Work Study Appliers**
- ➢ **EPAF Applier**

Use the Magnifying glass search icon [search icon] to select the most appropriate approver from the available users.

These are three possible Required Actions

Approve - The individual is required to "approve" the EPAF. The EPAF cannot be approved at a higher level until it is approved at the lower levels.

Apply- Only an individual at the Human Resources level can "apply an EPAF. This is the action that occurs when an EPAF is converted into a jobs record in the payroll system. Always select the same individual who approves an EPAF at the Human Resources Level to Apply the EPAF.

FYI- An EPAF originator can select additional individuals at different levels to "FYI" or "acknowledge" the EPAF. Unlike the required action to "approve," an EPAF can be approved and applied at higher levels if the

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> **NOTE:** Once comments are "saved," they cannot be changed. Be careful with articulating comments. An EPAF user can make multiple comments to the EPAF, and comments can be attached to the EPAF at any approval level.

Step 7: Save & Submit

To complete the EPAF, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

ERROR: Error messages

WARNING: Warning messages simply deliver information, and still allow the EPAF to progress successfully. Usually, warning messages inform the originator, approvers, and payroll department about budget issues associated with the job.

EPAFs for Staff Assignments (HIRE10)

Step 1: New EPAF Person Selection

New EPAF Person Selection

☐ Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

☐ - indicates a required field.

ID: ☐ [_____] 👤 🔍

Query Date: MM/DD/YYYY ☐ [08/27/2013]
Approval Category: ☐ [Hire Full-Time Monthly Staff, HIRE10   ▼]
[Go]
☐ There are no active jobs based on the Query Date.
[All Jobs]

ID
Start by searching for the employee for whom the EPAF is being created for. If the person is already an employee of the University, type his or her S-Number into the ID field. If it is not known that the person is an employee, then search the employee database.

Person Search

☐ Check the box to limit the search to an Employee. Enter the Last Name and or First Name, or wildcard.

Search Criteria
Employee: ☐
Last Name: [_____]
First Name: [_____]
  Or

ID: [_____]
  Or

SSN/SIN/TIN: [_____]

To search the employee database, click on the magnifying glass icon 🔍 , check the "Employee" box, and enter identifying information about the person. If the person is an employee the search will return results. If the person is not defined as an employee……………

APPROVAL CATEGORY

There are several types of EPAFs. The body of the EPAF populates based upon the selected Approval Category. The Approval Category also determines which levels are required for EPAF approval.

Select the appropriate **Approval Category** from the drop down menu

New EPAF Person Selection

☐ Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

☐ - indicates a required field.

ID: ☐ [300020297] [Lester A Pourciau] 👤 🔍

Query Date: MM/DD/YYYY☐ [08/27/2013]

Approval Category: ☐ [Hire Full-Time Monthly Staff, HIRE10] ▼   **CLICK "GO"**

[Go]

☐ There are no active jobs based on the Query Date.

[All Jobs]

Step 2: Job Selection

In this step, the job is identified. The EPAF either creates a new job or modifies an existing job.

Type in a new position number and suffix if the EPAF creates a brand new assignment for the employee. If the position number is unknown, click on the magnifying glass icon 🔍 to search.

New EPAF Job Selection

☐ Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: Lester A Pourciau, 300020297

Query Date: Aug 27, 2013

Approval Category: Hire FT Monthly Staff, HIRE10

Create a New Job Assingment, JOBS01

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									◉

☐ There are no active jobs based on the Query Date.

[All Jobs]

[Next Approval Type] [Go]   **CLICK "GO"**

The position number connects the job to the budgeted FOAP. In most cases, each job has its own unique position number. Nevertheless, multiple employees can have jobs under a shared or pooled position number if these employees are part-time, on the same payroll, and are paid out of the same FOAP.

The suffix differentiates one job from another within the same position number. The EPAF user assigns the suffix - this is not automatically populated. When assigning a suffix, keep in mind that Banner suffixes are double digit beginning with 00 through 99. It is recommended that the user assign a suffix with the lowest number in the range as possible. Most staff employees have exactly one job, so the newly assigned suffix should likely be 00.

Step 3: Main Job Information

Step 3 populates many fields for data entry depending on the Approval Category selected in Step 1.

Create New Employee Record

Item	Current Value	New Value
Employee Class Code: ☐	MU, Monthly Unclassified	MU
Employee Status: (Not Enterable)	Terminated	A
Home COAS: ☐(Not Enterable)	C	C
Home Organization: ☐	11401, Off of the VP for Human Resources	11401
Current Hire Date: MM/DD/YYYY☐	02/13/2012	08/27/2013
Original Hire Date: MM/DD/YYYY	02/13/2012	
Adjusted Serv. Date: MM/DD/YYYY	01/13/2001	
First Work Date: MM/DD/YYYY	02/13/2012	

The Home Organization is the Budget Code

Create a New Job Assingment, 1M9883-00 Director of Human Resources NO

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY☐		08/27/2013
Jobs Effective Date: MM/DD/YYYY☐		08/27/2013
Personnel Date: MM/DD/YYYY		
Contract Type: ☐		Primary
Title:		Director of Human Resources NO
Annual Salary: ☐		99000
Step: ☐(Not Enterable)		0
Job Change Reason: ☐(Not Enterable)		10000

Enter Annual Salary Amount

Step 4: Labor Distribution/FOAP

Step 4 determines how the labor for this position will be charged within Business & Finance. The FOAP is a four part numeric sequence that includes a Fund, Organization, Account, and Program number.

New

Effective Date: MM/DD/YYYY 08/27/2013

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance
C		111008	11401	61002	16000					100.00	
										Total:	
										100.00	

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Step 5: Routing Queue

Step 5 determines the individuals who approve the EPAF.

Routing Queue

Approval Level	User Name		Required Action
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1 - (HRREVW) HR Review	KADRICA_TILLOTSON	Kadrica D Tillotson	Approve
10 - (BUDGET) Budget Office	JONESPAM	Pamela D Jones	Approve
80 - (VCHANC) Vice Chancellor	ROSTAY	Rosie J Taylor	Approve
Not Selected			Not Selected

Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

All possible Approval Levels include:
  ➢ **HR Review**
  ➢ **Budget Office**

- ➢ **SUBR Level 1**
- ➢ **SUNO Level 1**
- ➢ **SUSLA Level 1**
- ➢ **SUS Chancellors**
- ➢ **SUS President**
- ➢ **Budget Approvers for Grants**
- ➢ **Financial Aid Approvers of EPAFs**
- ➢ **Graduate School Approvers**
- ➢ **College Work Study Approvers**
- ➢ **SUS Vice Chancellors**
- ➢ **College Work Study Appliers**
- ➢ **EPAF Applier**

Use the Magnifying glass search icon [ ] to select the most appropriate approver from the available users.

These are three possible Required Actions

Approve - The individual is required to "approve" the EPAF. The EPAF cannot be approved at a higher level until it is approved at the lower levels.

Apply- Only an individual at the Human Resources level can "apply an EPAF. This is the action that occurs when an EPAF is converted into a jobs record in the payroll system. Always select the same individual who approves an EPAF at the Human Resources Level to Apply the EPAF.

FYI- An EPAF originator can select additional individuals at different levels to "FYI" or "acknowledge" the EPAF. Unlike the required action to "approve," an EPAF can be approved and applied at higher levels if the

Step 6: Comment

The comment field allows the EPAF Originator to input any text to add information and clarification to the EPAF. Include any other pertinent details about the EPAF in the comments. For example, if employee is assuming a new position, an Originator may include the start date of their position, who they are replacing, and what position they are leaving. Originators may enter union status in comments as well.

> **NOTE:** Once comments are "saved," they cannot be changed. Be careful with articulating comments. An EPAF user can make multiple comments to the EPAF, and comments can be attached to the EPAF at any approval level.

Step 7: Save & Submit

To complete the EPAF, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

    ERROR: Error messages

    WARNING: Warning messages simply deliver information, and still allow the EPAF to progress successfully. Usually, warning messages inform the originator, approvers, and payroll department about budget issues associated with the job.

EPAFs for Student Assignments

Student Job Types, Employee Class, & Approval Category

Job Type	E-Class	Approval Category
Graduate Assistant (Monthly)	GM	HIRE70
Graduate Assistant (Faculty)	GA	HIRE70
Federal Work Study	CW	HIRE90
Student Worker	UG	HIRE91

Use the chart above to determine the appropriate Employee Class to use for a Student Assignments.

EPAF Approval Category:

The Student Assignment forms **(HIRE70, HIRE90, & HIRE91)** are used to create new assignments for students.

Step 1: Define Employee, Query Date, and Approval Category

In the New EPAF Person Selection Screen, provide employee's **S-Number** or search for employee.

Query Date is the pay period start date.

➤ Select appropriate **Approval Category** (HIRE70, HIRE90, HIRE91)

➤ Click **"Go"**

Step 2: Job Selection

　　　In the New EPAF Job Selection screen, input the appropriate Position number and Suffix.

To determine the Suffix, click the All Jobs button in the bottom left, survey the employee's Existing Jobs and note the other jobs with the same position number assigned to that employee.

Select the suffix number next in sequence that is not already used (e.g. If you are creating an assignment with position #, and there already exist jobs 2S9999-00 and 2S9999-01, use the suffix of 02 for the new assignment that you are creating). If employee has no existing jobs, begin the sequence with "00".

Step 3: Enter Main Job Information

Create New Employee Record

Item	Current Value	New Value
Employee Class Code: ☐	CW, College Work Study	UG
Employee Status: (Not Enterable)	Active	A
Home COAS: ☐(Not Enterable)	C	C
Home Organization: ☐	26301, Financial Aid Office	22477
Current Hire Date: MM/DD/YYYY☐	01/12/2011	10/09/2013
Original Hire Date: MM/DD/YYYY	01/12/2011	
Adjusted Serv. Date: MM/DD/YYYY	01/12/2011	
First Work Date: MM/DD/YYYY	01/12/2011	

Create a New Hourly Job, 2S9273-00 Student Workers-Bwkly/Law

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY☐		10/09/2013
Jobs Effective Date: MM/DD/YYYY☐		10/09/2013
Personnel Date: MM/DD/YYYY		
Contract Type: ☐		Primary
Title:		Student Worker
Regular Rate: ☐		10.00
Step: ☐(Not Enterable)		0
Job Change Reason: ☐(Not Enterable)		10000

Job Begin Date: The Start Date of a pay period except when the EPAF modifies a current assignment, then Job Begin Date should match the Current Value.

Jobs Effective Date: The first day of a pay period (query date)

➢ Select the Employee Class

  o **GM** – Graduate Assistant Monthly

  o **GA** – Graduate Assistant Faculty

  o **CW** – College Work Study

  o **UG** – Undergraduate Worker

➢ Select the Departments Home Organization (if unknown, click the magnifying glass [🔍] icon to search for the appropriate code.) Leave the Original Hire Date, Adjusted Serv. Date, First Work Date, & Personnel Date fields blank.

➢ Select the Contract Type

- o **Primary:** Every employee must have a "primary" job. If an employee already possesses a primary job assignment, select another option.

- o **Overload:** Additional assignments are "overload" jobs.

- o **Secondary:** DO NOT USE FOR STUDENT ASSIGNMENTS.

➢ Enter the Job Title of the applicable worker in the Title field.

➢ Enter the student's hourly rate in the Regular Rate field.

Step 4: Labor Distribution/FOAP

Step 4 determines how the labor for this position will be charged within Business & Finance. The FOAP is a four part numeric sequence that includes a Fund, Organization, Account, and Program number.

New

Effective Date: MM/DD/YYYY 08/27/2013

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance
C		111008	11401	61002	16000					100.00	
										Total:	
										100.00	

The FOAP populates based upon the Position Number indicated in Step 2. Confirm that the FOAP is correct. If the reason for the EPAF is to initiate a change in the FOAP, type the correct FOAP here. If the position should be charged to multiple FOAPs, type in each FOAP and appropriate percentage. The sum of all percentages must total 100%.

Step 5: Routing Queue

Step 5 determines the individuals who approve the EPAF.

Routing Queue			
Approval Level	**User Name**		**Required Action**
99 - (APPLY) EPAF Applier	EWASHIN	Ethel R. Washington	Apply
1 - (HRREVW) HR Review	KADRICA_TILLOTSON	Kadrica D Tillotson	Approve
10 - (BUDGET) Budget Office	JONESPAM	Pamela D Jones	Approve
80 - (VCHANC) Vice Chancellor	ROSTAY	Rosie J Taylor	Approve

Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

All possible Approval Levels include:

- ➢ **HR Review**
- ➢ **Budget Office**
- ➢ **SUBR Level 1**
- ➢ **SUNO Level 1**
- ➢ **SUSLA Level 1**
- ➢ **SUS Chancellors**
- ➢ **SUS President**
- ➢ **Budget Approvers for Grants**
- ➢ **Financial Aid Approvers of EPAFs**
- ➢ **Graduate School Approvers**
- ➢ **College Work Study Approvers**
- ➢ **SUS Vice Chancellors**
- ➢ **College Work Study Appliers**
- ➢ **EPAF Applier**

Use the Magnifying glass [🔍] search icon to select the most appropriate approver from the available users.

These are three possible Required Actions

Approve - The individual is required to "approve" the EPAF. The EPAF cannot be approved at a higher level until it is approved at the lower levels.

Apply- Only an individual at the Human Resources level can "apply an EPAF. This is the action that occurs when an EPAF is converted into a jobs record in the payroll system. Always select the same individual who approves an EPAF at the Human Resources Level to Apply the EPAF.

FYI- An EPAF originator can select additional individuals at different levels to "FYI" or "acknowledge" the EPAF. Unlike the required action to "approve," an EPAF can be approved and applied at higher levels if the EPAF Approver does not perform the required action of "FYI."

Step 6: Comment

The comment field allows the EPAF Originator to input any text to add information and clarification to the EPAF. Include any other pertinent details about the EPAF in the comments. For example, if employee is assuming a new position, an Originator may include the start date of their position, who they are replacing, and what position they are leaving. Originators may enter union status in comments as well.

> **NOTE:** Once comments are "saved," they cannot be changed. Be careful with articulating comments. An EPAF user can make multiple comments to the EPAF, and comments can be attached to the EPAF at any approval level.

Step 7: Save & Submit

To complete the EPAF, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

ERROR: Error messages

WARNING: Warning messages simply deliver information, and still allow the EPAF to progress successfully. Usually, warning messages inform the originator, approvers, and payroll department about budget issues associated with the job.

EPAFs for Special Hire Assignments

Step 1: Define Employee, Query Date, and Approval Category

In the New EPAF Person Selection Screen, provide employee's S-Number or search for employee.

Query Date is the pay period start date.

➢ Select **HIRE80** Approval Category for Special Hire

➢ Click **"Go"**

Step 2: Job Selection

In the New EPAF Job Selection screen, input the appropriate Position number and Suffix.

To determine the Suffix, click the All Jobs button in the bottom left, survey the employee's Existing Jobs and note the other jobs with the same position number assigned to that employee.

Select the suffix number next in sequence that is not already used (e.g. If you are creating an assignment with position #, and there already exist jobs 2S9999-00 and 2S9999-01, use the suffix of 02 for the new assignment that you are creating). If employee has no existing jobs, begin the sequence with **"00"**.

Step 3: Enter Main Job Information

Create a New Hourly Job, 2D9944-00 Special Hire Employees

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY☐		10/20/2013
Jobs Effective Date: MM/DD/YYYY☐		10/20/2013
Personnel Date: MM/DD/YYYY		
Contract Type: ☐		Primary
Title:		Special Hire
Regular Rate: ☐		11.00
Step: ☐(Not Enterable)		0
Job Change Reason: ☐(Not Enterable)		10019

Job Begin Date: The Start Date of a pay period except when the EPAF modifies a current assignment, then Job Begin Date should match the Current Value.

Jobs Effective Date: The first day of a pay period (query date)

➤ Select the Contract Type
- o **Primary:** Every employee must have a "primary" job. If an employee already possesses a primary job assignment, select another option.
- o **Overload:** Additional assignments are "overload" jobs.
- o **Secondary:** DO NOT USE FOR STUDENT ASSIGNMENTS.

➢ Enter the Job Title of the applicable worker in the **Title** field.

➢ Enter the employee's hourly rate/salary in the **Regular Rate** field.

Step 4: Labor Distribution/FOAP

Step 4 determines how the labor for this position will be charged within Business & Finance. The FOAP is a four part numeric sequence that includes a Fund, Organization, Account, and Program number.

New
Effective Date: MM/DD/YYYY 08/27/2013

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance
C		111008	11401	61002	16000					100.00	
									Total:	100.00	

The FOAP populates based upon the Position Number indicated in Step 2. Confirm that the FOAP is correct. If the reason for the EPAF is to initiate a change in the FOAP, type the correct FOAP here. If the position should be charged to multiple FOAPs, type in each FOAP and appropriate percentage. The sum of all percentages must total 100%.

Step 5: Routing Queue

Step 5 determines the individuals who approve the EPAF.

Routing Queue

Approval Level	User Name		Required Action
99 - (APPLY) EPAF Applier	EWASHIN	Ethel R. Washington	Apply
1 - (HRREVW) HR Review	KADRICA_TILLOTSON	Kadrica D Tillotson	Approve
10 - (BUDGET) Budget Office	JONESPAM	Pamela D Jones	Approve
80 - (VCHANC) Vice Chancellor	ROSTAY	Rosie J Taylor	Approve

Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

All possible Approval Levels include:

- ➢ **HR Review**
- ➢ **Budget Office**
- ➢ **SUBR Level 1**
- ➢ **SUNO Level 1**
- ➢ **SUSLA Level 1**
- ➢ **SUS Chancellors**
- ➢ **SUS President**
- ➢ **Budget Approvers for Grants**
- ➢ **Financial Aid Approvers of EPAFs**
- ➢ **Graduate School Approvers**
- ➢ **College Work Study Approvers**
- ➢ **SUS Vice Chancellors**
- ➢ **College Work Study Appliers**
- ➢ **EPAF Applier**

Use the Magnifying glass search icon to select the most appropriate approver from the available users.

These are three possible Required Actions

Approve - The individual is required to "approve" the EPAF. The EPAF cannot be approved at a higher level until it is approved at the lower levels.

Apply- Only an individual at the Human Resources level can "apply an EPAF. This is the action that occurs when an EPAF is converted into a jobs record in the payroll system. Always select the same individual who approves an EPAF at the Human Resources Level to Apply the EPAF.

FYI- An EPAF originator can select additional individuals at different levels to "FYI" or "acknowledge" the EPAF. Unlike the required action to "approve," an

EPAF can be approved and applied at higher levels if the EPAF Approver does not perform the required action of "FYI."

Step 6: Comment

The comment field allows the EPAF Originator to input any text to add information and clarification to the EPAF. Include any other pertinent details about the EPAF in the comments. For example, if employee is assuming a new position, an Originator may include the start date of their position, who they are replacing, and what position they are leaving. Originators may enter union status in comments as well.

> **NOTE:** Once comments are "saved," they cannot be changed. Be careful with articulating comments. An EPAF user can make multiple comments to the EPAF, and comments can be attached to the EPAF at any approval level.

Step 7: Save & Submit

To complete the EPAF, click Save then Submit. If there are any data validity issues within the EPAF, Banner will display two types of messages:

ERROR: Error messages

WARNING: Warning messages simply deliver information, and still allow the EPAF to progress successfully. Usually, warning messages inform the originator, approvers, and payroll department about budget issues associated with the job.

EPAF Originator Summary

The **EPAF Originator Summary** lists EPAFs that the Originator has created, voided, saved, or submitted. It also contains EPAFs that have been Returned for Correction and require the Originators attention.

To access the EPAF Originator Summary screen, log into Self Service Banner and select the Employee Tab.

User ID: 00000000
PIN: ••••••
Login   Forgot PIN?

Select: **Electronic Personnel Action Form**

Personal Information   Student   Financial Aid   **Employee**

Search [   ] Go
RETURN

Employee

Time Sheet
Electronic Personnel Action Forms
Benefits and Deductions
Retirement, health, flexible spending, miscellaneous, beneficiary, benefits enrollment, Benefit Summary
Pay Information
Direct deposit allocation, earnings and deductions history, or pay stubs.

Select **EPAF Originator Summary**

Electronic Personnel Action Form

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

Within the EPAF Originator Summary, there are two tabs: Current and History.

The Current tab is similar to an "inbox" for the EPAF Originator Summary. Two types of EPAFs appear in the Current tab:

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Tillotson, Kadrica D. ERP Programmer Analyst, 2M9742-00	5	26	Change Salary		Jul 01, 2013	Waiting	Comments

1 - 1 of 1

Waiting
If an EPAF has been created and saved (but not submitted), it remains with the Waiting status and can be found in the EPAF Originator Summary.

Returned for Correction
If an EPAF contains an error or incorrect data, instead of approving it, an Approver will return it for correction. To view a returned EPAF, click on the employee's name.

Usually, the Approver will note the reason for the return under the Comments of the EPAF. The EPAF Originator has two options: **Void** or **Update**.

EPAF Preview

☐ You are acting as an Originator.
Name and ID: Kadrica D Tillotson, 301317955 **Job and Suffix:** 2M9742-00, ERP Programmer Analyst
Transaction: 26 **Query Date:** Jul 29, 2013
Transaction Status: Waiting **Last Paid Date:**
Approval Category: Change Salary, CHNG00

[Delete] [Void] Update | Add Comment

Click **Void** to void and EPAF. This will permanently inactivate the EPAF.

Click **Update** to make any changes to the EPAF.
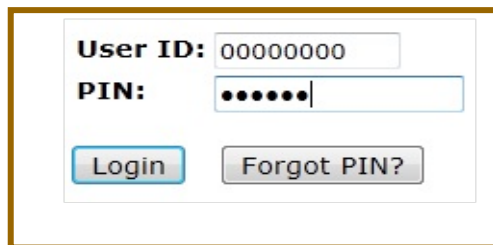
NOTE: Only the Originator can make changes to the EPAF. If the Originator makes changes, he or she must save and submit the EPAF to send it through the Approval Queue. The EPAF must be re-approved on all levels.

Approving EPAFs

EPAF Approver Summary

The EPAF Approver Summary contains EPAFs that have the Approver listed in the Approval Queue.
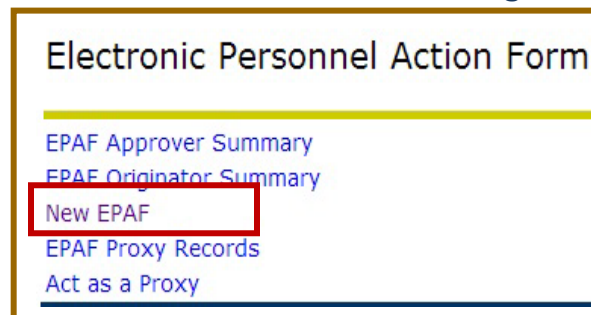
To access the EPAF Approver Summary screen, log into Self Service Banner and the select the **Employee Tab**.

➤ Select: **Electronic Personnel Action Form**

➤ Select: **EPAF Approver Summary**

Within the EPAF Originator Summary, there are three tabs: **Current**, **In My Queue**, and **History**.

History Tab

All EPAFs created by the Originator are stored in the History tab. To check the status of an EPAF, on the EPAF Originator Summary screen, click the **History** tab, and notice the Transaction Status of the EPAF.

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
Washington, Ethel R. Hum Res Supervisor, 1B9981-00		32	Change Job Title	Sep 10, 2013	Sep 10, 2013	Approve	☐	Comments
Chisley, Kretrice B. Hum Res Spec, 1B9979-00		12	Terminate Job & Employee	Aug 26, 2013	Jun 30, 2013	Apply		Comments

Possible Transactions statuses include:

Pending: The EPAF is pending approval
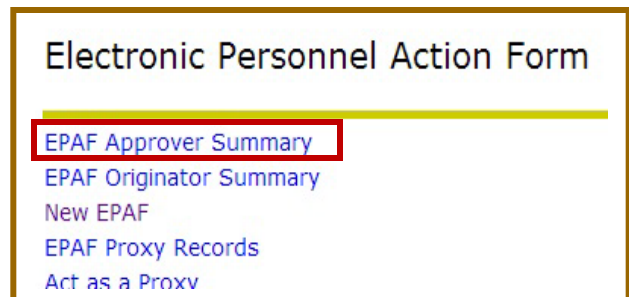
Complete: The EPAF has been completed and applied to the employee's personnel record.

Returned: The EPAF has been returned for correction

Voided: The EPAF has been voided but its history remains available.

Overridden: The EPAF has been overridden and approved by a Super User at the Payroll level.

Removed from Queue: The EPAF has been returned to the Originator for correction thus is removed from the Approval Queue.

NOTE: The Originator can only modify an EPAF if it has not been viewed or approved at a higher level in the approval queue. Click on the EPAF, and if the option Return for Correction exists, then the Originator may return it to him or herself, make a change, then resubmit.

Approving, Acknowledging, or Returning EPAFs

Current Tab
The Current Tab is similar to an "inbox" for the EPAF Approver Summary. EPAFs that require the Approver's attention appear here.

An EPAF can be approved by two ways. First, check the "Action" box next to each EPAF to be approved. Then, click **Save**.

To view an EPAF, click on the employee's name. Review the EPAF. The Approver has two options:

Approve
     Click **Approve** to approve the EPAF and allow it to progress to the next approval level in the routing queue.

Return for Correction
     Click this button to return the EPAF to the originator for correction.
     IMPORTANT: Approvers who return EPAFs should *Add Comment* to the EPAF indicating the reason for return.

If the Required Action of an EPAF is **Acknowledge** or **FYI**, the Approver only has one option. However, the Approver can add a comment to the EPAF.

In My Queue Tab
The In My Queue tab shows EPAFs that are pending in the queue of the Approver. However, these EPAFs may not have been approved yet at a lower level. Or the EPAFs may be **"voided"**.

The History tab shows EPAFs that have been approved or acknowledged by the Approver.

NOTE: Click on Search to find EPAFs by S-Number, Employee Name, EPAF Transaction Number, and more. The search function will search the **Current**, **In My Queue**, and **History** Tabs.

EPAF Approval Types

- ➤ **HIRE** – Select this approval category to create a new assignment for an existing employee.
- ➤ **AJOB** – Select this approval category to add a Secondary/Overload Job Assignment for an existing employee.
- ➤ **CHNG** – Select this approval category to process a change in an employee's hourly rate, job title, stipend, or labor distribution.
- ➤ **LEAV** – Select this approval category in order start or end a leave of absence for an employee.
- ➤ **TRAN** – Select this approval category in order to process a job transfer by terminating one job assignment and starting a new one for an employee.
- ➤ **RACT** – Select this approval category in order to reactivate a job assignment for adjunct faculty employees.
- ➤ **TERM** – Select this approval category in order to terminate an employee and/or an employee's job assignment.

Designate a Proxy Approver

1. Go to **Electronic Personnel Action Form** under the **Employee** tab.

2. Select **EPAF Proxy Records**.

Electronic Personnel Action Form

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy

3. Select the **Approval Level** for which you wish to designate a Proxy Approver from the drop down menu. Click **Go**.

EPAF Proxy Records

Approval Level: HR Review, HRREVW [Go]

Name   **Remove Add**
Not Selected
[Save]

4. From the **Name** drop down menu, select the individual to designate as the Proxy Approver.

5. Check "Add" next to the individual's name, then click **Save**.

To remove a Proxy Approver from your Proxy Record, check "Remove" next to the individual's name, then click **Save**.

IMPORTANT:

When designating a Proxy Approver, be advised that the proxy must have security access at the designated approval level.

Act as a Proxy Approver

1. Go to **Electronic Personnel Action Form** under the **Employee** tab.

2. Select **Act as a Proxy**.

3. Select the individual you wish to Proxy For with the drop down menu.

4. **Submitted From Date** and **Submitted to Date**: Leave blank if you want to see all EPAFs that require this individual's approval. Or input submission date parameters.

5. Click **Go**.

6. You will have access to approve, acknowledge, or return EPAFs at the approval level for which you have been designated by the EPAF Approver.

IMPORTANT – To perform proxy functions:

➢ You must have security access at the levels for which you will approve EPAFs. You must be a designated proxy by the original approver.

Change Salary (CHNG00)

In the New EPAF Person Selection Screen, provide employee's S-Number or search for employee. Query Date is the pay period start date.

➢ Select **CHNG00** Approval Category to make a Hourly Salary Change

➢ On the **New EPAF Job Selection** screen, select the appropriate Position number you want to make the change on.

➢ Enter the new salary amount in the **Annual Salary** field.

➢ Select the appropriate Routing Queue of the individuals who will approve the EPAF. Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

➢ Lastly, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

   o **ERROR:**   Error messages

   o **WARNING:** Warning messages simply deliver information, and still allow the EPAF to progress successfully.

Change Hourly Rate (CHNG02)

In the New EPAF Person Selection Screen, provide employee's S-Number or search for employee. Query Date is the pay period start date.

➢ Select **CHNG02** Approval Category to make a Hourly Rate Change

➢ On the **New EPAF Job Selection** screen, select the appropriate Position number you want to make the change on.

➢ Enter the new hourly rate in the **Regular Rate** field.

➢ Select the appropriate Routing Queue of the individuals who will approve the EPAF. Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

➢ Lastly, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

      o **ERROR:**   Error messages

      o **WARNING:** Warning messages simply deliver information, and still allow the EPAF to progress successfully.

Change Job Title (CHNG05)

In the New EPAF Person Selection Screen, provide employee's S-Number or search for employee. Query Date is the pay period start date.

- ➢ Select **CHNG05** Approval Category to make a Job Title Change

- ➢ On the **New EPAF Job Selection** screen, select the appropriate Position number you want to make the change on.

- ➢ Enter the new job title in the **Title** field.

- ➢ Select the appropriate Routing Queue of the individuals who will approve the EPAF. Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

- ➢ Lastly, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

    - o **ERROR:**   Error messages

    - o **WARNING:** Warning messages simply deliver information, and still allow the EPAF to progress successfully.

Change Stipend (CHNG07)

In the New EPAF Person Selection Screen, provide employee's S-Number or search for employee. Query Date is the pay period start date.

> ➢ Select **CHNG07** Approval Category to make a Job Title Change

> ➢ On the **New EPAF Job Selection** screen, select the appropriate Position number you want to make the change on.

> ➢ Enter the applicable stipend information on the following screen.

> ➢ Select the appropriate Routing Queue of the individuals who will approve the EPAF. Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

> ➢ Lastly, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

>> o **ERROR:** Error messages

>> o **WARNING:** Warning messages simply deliver information, and still allow the EPAF to progress successfully.

Change Labor Distribution (CHNG09)

In the New EPAF Person Selection Screen, provide employee's S-Number or search for employee. Query Date is the pay period start date.

➢ Select **CHNG09** Approval Category to make a Labor Distribution Change

➢ On the **New EPAF Job Selection** screen, select the appropriate Position number you want to make the change on.

➢ Enter the new FOAP in the **Fund, Organization, Account, & Program** field.

➢ Select the appropriate Routing Queue of the individuals who will approve the EPAF. Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

➢ Lastly, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

  o **ERROR:**   Error messages

  o **WARNING:** Warning messages simply deliver information, and still allow the EPAF to progress successfully.

Start Leave of Absence (LEAV01)

In the New EPAF Person Selection Screen, provide employee's S-Number or search for employee. Query Date is the pay period start date (Enter the Date you would like the change to take effect.

- ➢ Select **LEAV01** Approval Category to Start a Leave of Absence for an employee.

- ➢ On the **New EPAF Job Selection** screen, select the appropriate Position number you want to make the change on.

- ➢ Select the employees' job status in the **Job Status** field.

- ➢ Select the employees' Change Reason in the **Job Change Reason** field.

- ➢ Select the appropriate Routing Queue of the individuals who will approve the EPAF. Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

- ➢ Lastly, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

    - o **ERROR:**   Error messages

    - o **WARNING:** Warning messages simply deliver information, and still allow the EPAF to progress successfully.

End Leave of Absence (LEAV02)

In the New EPAF Person Selection Screen, provide employee's S-Number or search for employee. Query Date is the pay period start date (Enter the Date you would like the change to take effect.

➢ Select **LEAV01** Approval Category to Start a Leave of Absence for an employee.

➢ On the **New EPAF Job Selection** screen, select the appropriate Position number you want to make the change on.

➢ Enter the Date the employees Leave of Absence Ends in the **Leave End Date** field.

➢ Select the appropriate Routing Queue of the individuals who will approve the EPAF. Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

➢ Lastly, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

     o **ERROR:**   Error messages

     o **WARNING:** Warning messages simply deliver information, and still allow the EPAF to progress successfully.

Job Transfer (TRAN10, TRAN20, TRAN50)

In the New EPAF Person Selection Screen, provide employee's S-Number or search for employee. Query Date is the pay period start date (Enter the Date you would like the change to take effect.

➢ Select the applicable Approval Category that corresponds to the employee.

➢ On the **New EPAF Job Selection** screen, select the Employee's Job Assignment you would like to terminate then click **NEXT APPROVAL TYPE**

➢ On the **New EPAF Job Selection** screen, type in a position number and suffix of the new Job Assignment to search then Click **GO**. (If the position number is unknown, click on the magnifying glass icon 🔍

➢ Under the **End Job Assignment** section, Enter the Effective Date of Termination for the old job assignment in the Jobs Effective Date Field (A).

➢ Under the **Transfer New Employee** section, Enter the Employees Class Code (B) and Home Organization (C).

➢ Under the **Create a New Job Assignment** section, Enter the Job Begin Date (E) and Job Effective Date (F), Job Title (G), & the Salary/Rate (H), & the select the applicable Job Change Reason (I) for the new job assignment.

End Job Assignment, 2M9840-00 Counselor, Last Paid Date: Dec 31, 2013

Item	Current Value	New Value	
Jobs Effective Date: MM/DD/YYYY ☐	10/01/2012	12/31/2013	**A**
Personnel Date: MM/DD/YYYY	10/01/2012		
Job Status: ☐ (Not Enterable)	Active	T	
Job Change Reason: ☐		10008, Lateral Transfer ▼	

Transfer New Employee to New Department

Item	Current Value	New Value	
Employee Class Code:	MU, Monthly Unclassified 🔍	MU	**B**
Home Organization:	26301, Financial Aid Office 🔍	22683	**C**
Distribution Orgn:	26301, Financial Aid Office 🔍	22683	**D**

Create a New Job Assingment, 2M9195-00 Project Coordinator

Item	Current Value	New Value	
Job Begin Date: MM/DD/YYYY ☐		01/01/2014	**E**
Jobs Effective Date: MM/DD/YYYY ☐		01/01/2014	**F**
Personnel Date: MM/DD/YYYY			
Contract Type: ☐		Primary ▼	
Title:		Project Coordinator	**G**
Annual Salary: ☐		55000	**H**
Step: ☐ (Not Enterable)		0	
Job Change Reason: ☐		10008, Lateral Transfer ▼	**I**

➢ Select the appropriate Routing Queue of the individuals who will approve the EPAF. Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

➢ Lastly, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

   o **ERROR:**   Error messages

   o **WARNING:** Warning messages simply deliver information, and still allow the EPAF to progress successfully.

Reactivate Adjunct Assignment (RACT60, RACT61)

In the New EPAF Person Selection Screen, provide employee's S-Number or search for employee. Query Date is the pay period start date (Enter the Date you would like the change to take effect.

➢ Select the applicable Approval Category that corresponds to the employee.

➢ On the **New EPAF Job Selection** screen, select the Employee's Job Assignment you would like to reactivate then click **NEXT APPROVAL TYPE**

➢ On the **New EPAF Job Selection** screen, type in a position number and suffix of the new Job Assignment to search then Click **GO**. (If the position number is unknown, click on the magnifying glass icon

➢ Under the **Reactivate Adjunct Assignment** section, enter the Effective Start Date of the job assignment in the Jobs Effective Date Field. Lastly, enter the Job Title, the Annual Salary, Factor, Pays, & the select the applicable Job Change Reason.

➢ Under the **End Job Assignment** section, enter the End Date of the employee's job assignment in the **Jobs Effective Date** field.

➢ Select the appropriate Routing Queue of the individuals who will approve the EPAF. Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

➢ Lastly, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

   o **ERROR:**   Error messages

   o **WARNING:** Warning messages simply deliver information, and still allow the EPAF to progress successfully.

Terminate Job Assignment (TERM00)

Note: You must terminate an employee's Job Assignment before you can terminate as an employee.

Step 1: Define Employee, Query Date, and Approval Category

In the New EPAF Person Selection Screen, provide employee's S-Number or search for employee. Query Date is the pay period start date.

➤ Select **TERM00** Approval Category to terminate an employee's job assignment.

New EPAF Person Selection

☐ Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category.

☐ - indicates a required field.

ID: ☐ [S00010212] [Emmanuel O Nzewi] 👤 🔍

Query Date: MM/DD/YYYY ☐ [11/01/2013]
Approval Category: ☐ [Terminate Job Assignment, TERM00 ▼]

[Go]

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	2F9511	00	Professor	22683, Civil Engineering	Jul 01, 2009		Dec 31, 2013	Active

[All Jobs]

Step 2: Job Selection

In the New EPAF Job Selection screen, select the appropriate Position number you want to make the change on.

New EPAF Job Selection

☐ Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: [Emmanuel O Nzewi, S00010212]
Query Date: Nov 01, 2013
Approval Category: Terminate Job Assignment, TERM00

End Job Assignment, JOBS90

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									○
	Primary	2F9511	00	Professor	22683, Civil Engineering	Jul 01, 2009		Dec 31, 2013	Active	◉

[All Jobs]
[Go]

Step 3: Enter Main Job Information & Routing Queue

Enter the change reason in the Job Change Reason field. The Routing Queue determines the individuals who approve the EPAF. Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

Step 4: Save & Submit

To complete the EPAF, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

ERROR: Error messages

WARNING: Warning messages simply deliver information, and still allow the EPAF to progress successfully.

Terminate Employee (TERM01)

Step 1: Define Employee, Query Date, and Approval Category

In the New EPAF Person Selection Screen, provide employee's S-Number or search for employee. Query Date is the pay period start date.

➢ Select **TERM00** Approval Category to terminate an employee's job assignment.

New EPAF Person Selection

☐ Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category.

☐ - indicates a required field.

ID: ☐ [   ] 👷 🔍

Query Date: MM/DD/YYYY ☐ [11/01/2013]
Approval Category: ☐ [Terminate Job Assignment, TERM00 ▼]
[Go]

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	2F9511	00	Professor	22683, Civil Engineering	Jul 01, 2009		Dec 31, 2013	Active

[All Jobs]

Step 2: Enter Main Job Information & Routing Queue

Enter the change reason in the Job Change Reason field. The Routing Queue determines the individuals who approve the EPAF. Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

Electronic Personnel Action Form

☐ Enter the information for the EPAF and either Save or Submit.

Name and ID: Emmanuel O Nzewi, 300018212
Transaction: **Query Date:** Nov 01, 2013
Transaction Status: **Last Paid Date:** Dec 31, 2013
Approval Category: Terminate Job Assignment, TERM00

[Save]

Approval Types | Routing Queue | Transaction History

New EPAF | EPAF Originator Summary

Return to EPAF Menu

Jump to Bottom

☐ - indicates a required field.

End Job Assignment, 2F9511-00 Professor, Last Paid Date: Dec 31, 2013

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY ☐	10/01/2012	11/01/2013
Personnel Date: MM/DD/YYYY	10/01/2012	
Job Status: ☐(Not Enterable)	Active	T
Job Change Reason: ☐		10036, Resignation

Routing Queue

Approval Level		User Name		Required Action
1 - (HRREVW) HR Review	🔍	KJOSEPH	Kretrice B. Chisley	Approve
99 - (APPLY) EPAF Applier	🔍	EWASHIN	Ethel R. Washington	Apply
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected

[Save and Add New Rows]

Step 3: Save & Submit

To complete the EPAF, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

     ERROR: Error messages

     WARNING: Warning messages simply deliver information, and still allow the EPAF to progress successfully.

Terminate Job & Employee (TERM02)

Step 1: Define Employee, Query Date, and Approval Category

In the New EPAF Person Selection Screen, provide employee's S-Number or search for employee. Query Date is the pay period start date.

➢ Select **TERM02** Approval Category to terminate an employee's job assignment and employee.

New EPAF Person Selection

☐ Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

☐ - indicates a required field.

ID: ☐ [_____] Albert J Tezeno   [icons]

Query Date: MM/DD/YYYY ☐ [10/16/2013]
Approval Category: ☐ [Terminate Job & Employee, TERM02   ▼]
[Go]

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	2M9202	00	Assoc Vice Chancellor	22601, Dean of Enrollment Management	Jan 01, 2013		May 31, 2013	Active

[All Jobs]

Step 2: Job Selection

In the New EPAF Job Selection screen, select the appropriate Position number you want to make the change on.

New EPAF Job Selection

☐ Enter or search for a new position number and enter the suffix, or select the link under Title.

ID: [_____]
Query Date: Oct 16, 2013
Approval Category: Terminate Job & Employee, TERM02

End Job Assignment, JOBS90

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job	[____]	[____]							○
	Primary	2M9202	00	Assoc Vice Chancellor	22601, Dean of Enrollment Management	Jan 01, 2013		May 31, 2013	Active	●

[All Jobs]
[Go]

Step 3: Enter Main Job Information & Routing Queue

Enter the new hourly rate in the Regular Rate field. The Routing Queue determines the individuals who approve the EPAF. Each required Approval Level populates within the EPAF based upon the Approval Category selected in Step 1. However, the originator must select the individual User Name for each level.

Step 4: Save & Submit

Name and ID: _____   **Job and Suffix:** 2M9202-00, Assoc Vice Chancellor
Transaction: 71   **Query Date:**   Oct 16, 2013
Transaction Status: Waiting   **Last Paid Date:** May 31, 2013
Approval Category: Terminate Job & Employee, TERM02
[Save] [Submit] [Delete]

Approval Types | Routing Queue | Transaction History

New EPAF | EPAF Originator Summary

Return to EPAF Menu

Jump to Bottom

□ - indicates a required field.

End Job Assignment, 2M9202-00 Assoc Vice Chancellor, Last Paid Date: May 31, 2013

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY □	01/01/2013	10/16/2013
Personnel Date: MM/DD/YYYY	01/01/2013	
Job Status: □(Not Enterable)	Active	T
Job Change Reason: □	10000	10036, Resignation

End Employment

Item	Current Value	New Value
Employee Status: □(Not Enterable)	Active	T
Termination Date: MM/DD/YYYY □		10/16/2013
Last Work Date: MM/DD/YYYY □		10/16/2013
Term Reason Code: □		RG, Resignation

Routing Queue

Approval Level		User Name	
1 - (HRREVW) HR Review		KJOSEPH	Kretrice B. Chisley
99 - (APPLY) EPAF Applier		EWASHIN	Ethel R. Washington
Not Selected			
Not Selected			
Not Selected			
Not Selected			

[Save and Add New Rows]

To complete the EPAF, click **Save** then **Submit**. If there are any data validity issues within the EPAF, Banner will display two types of messages:

ERROR: Error messages

WARNING: Warning messages simply deliver information, and still allow the EPAF to progress successfully.

Important/Useful Information

- FOAP codes should always be preceded with a **(C)** to denote System Chart of Accounts.

- Position Numbers that begin with a **1** denote **SUS**.
- Position Numbers that begin with a **2** denote **SUBR**.
- Position Numbers that begin with a **3** denote **SULC**.
- Position Numbers that begin with a **4** denote **SUNO**.
- Position Numbers that begin with a **5** denote **SUSLA**.
- Position Numbers that begin with a **6** denote **SUAG**.

- When searching for an employee by S-Number on the New EPAF selection screen make sure to capitalize the **'S'**.

Additional Resources

Please visit the Human Resources website for additional resources:

➢ http://www.sus.edu/HumanResources

➢ EPAF TRAINING CERTIFICATION FORM

➢ EPAF ACCESS FORM

Special THANKS to the EPAF TEAM:

➢ Ethel R. Washington

➢ Rosie J. Taylor

➢ Kadrica D. Tillotson

➢ Pamela D. Jones

➢ Steven Sullivan

Southern University Office of Human Resources