

ELECTRONIC PERSONNEL ACTION FORM (EPAF)

Banner Human Resources Self Service User Manual



Release 1.3 January 2018

Table of Contents

duction:4

Navigation, Approval Category and Routing Queues

EPAFs Originators:	5
How to Search for a Person:	7
Selecting the Applicable Approval Category	10
How to Enter a Routing Queue Manually	12
How to Create a Default Routing Queue	13
How to Review the Originators Transactions and Their Statuses	14

General:

Overload Pay and Overload Pay (Continuing Education – Non Credit)	17
Adjunct Rehire and Adjunct Rehire (Continuing Education – Non Credit)	26
Summer School Overload Pay	35
Summer School Overload Pay – Continuing Education	35
Summer School Overload Pay (Course Taught/Paid Over Both Sessions)	35
Summer School Overload Pay – Continuing Education (Course Taught/Paid Over Both Sessions)	35
Summer School Adjunct Re-Appointment	45
Summer School Adjunct Re-Appointment – Continuing Education	45
Summer School Adjunct Re-Appointment (Course Taught/Paid Over Both Sessions)	45
Summer School Adjunct Re-Appointment – Continuing Education (Course Taught/Paid Over Both Sessions)	45
One-Time Payments – Extra Services (Non Academic Affairs)	55
One-Time Payments – Extra Services (Academic Affairs)	55
Termination/Resignation of Employee	67
Update Labor Distributions	72
Campus Address Change	77

EPAF Approvers

ing the EPAF Menu

The EPAF Approver Summary	83
The Current Link	84
Reviewing Your Work before Approving	85
The "In MY Queue" Link	87
The History Link	87

OMMON EPAF ERRORS

INTRODUCTION

The Banner system is a web-based, administrative software application developed by Ellucian. This system provides Delta State University with online administrative functionality. This feature enables authorized users to complete Personal actions via the web (Employee Self Service) for authoring that action. The Human Resources system is a complete employee information and management system within the integrated Banner product.

The Electronic Personnel Action Form (EPAF) function of Banner allows the University to process paperless personnel actions. EPAFs are simple, concise, and allow many values or data elements to default into the document without manual data entry. The forms enable the University to achieve our goal to process personnel actions rapidly, through an electronic approval process, providing an audit trail of all approval/disapproval history.

This reference guide provides step-by-step instructions for using the EPAF functionality in Employee Services. It is required that departmental users complete the EPAF training session with a level of competence in order to gain access to the EPAF functionality.

For questions about EPAF processing, please call x4035 for assistance.

EPAF ORIGINATORS

The EPAF process begins with a change or update for an employee's record and/or job. In order to update the system with the new information, an EPAF must be initiated in Employee Self Service. This section provides the originator with information about accessing EPAFs in Employee Self Service, tracking EPAFs, and deleting transactions that have been started but no longer need to be processed.

Accessing EPAF menu in DSU Online Services

To access the EPAF menu, you must have authorization to initiate and/or approve in DSU Online Services. Once you have the appropriate authorizations, you will need to log on to DSU Online Services.

Accessing Employee Self Service through DSU Online Services

Employee Self Service can be accessed through the DSU website:

- 1. Open your internet browser on your computer.
- 2. Click on myDSU.
- 3. Click on Login under DSU online services.
- 4. Click on Login again to gain access to Employee Self Services.





DSU Online is a convenient way to take care of business online for Faculty, Staff, and atudents. Within DSU Online students can register for classes, eneck grades, view unofficial transcripts, pay for tuition, and more. Faculty members can advise students, post grades, view advisees transcripts and more. Students can use these links to access the **Student Handbook** and to access all policies, including grievance procedures, grading, and refund policies, in the **University Policy Manual**.



Canvas is the University's new learning management system (LMS). All online courses and content will be delivered from Canvas beginning June 2013. For additional resources and assistance with Canvas please visit **more information**.

File Edit View Favorites Tools Help





5. Enter your 900# and password.

Please enter your User Identification Number (ID) and your Password . When finished, select Login. To protect your privacy, please Exit and close your browser when you are finished.		HELP EXIT
To protect your privacy, please Exit and close your browser when you are finished.	P Pk	ase enter your User Identification Number (ID) and your Password. When finished, select Login.
	То	protect your privacy, please Exit and close your browser when you are finished.
Note: If you have forgotten your password, enter your User ID(UID), then click "Forgot Password?"	No	te: If you have forgotten your password, enter your User ID(UID), then click "Forgot Password?"
	er ID	
	N:	
		5 (0)00

6. Click on Employee Services.



7. Click on Electronic Personnel Action Forms



8. Click on New EPAF

Act as a Proxy RELEASE: 8.9



How to Search for a Person

Once you are logged into Employee Services and navigated to select the link to enter a new EPAF you will see the following web page. In this section you will learn to search for the person you want to conduct a transaction on.

When you do not know the 900 number you can search for it by pressing the magnifying glass icon next to the ID field.

reisonal mornation	n Alumni and Friends Student and	td Financial Aid Employee Se	Nices -
Search	Go	RET	JRN TO EMPLOYEE MENU SITE MAP HELP EXIT
New EPAF P	erson Selection		
The selection The selection of the selec	ect the link to search for an ID, or g	generate an ID. Enter the Que	ry Date and select the Approval Category. Select Go.
* - indicates a required	field.		Click on the magnifying glass to
ID: 🗧	\$ Q	└───>	search employee by name
Query Date: MM/D	D/YYYY 10/02/2014		
Approval Category	Not Selected	•	
Go			
			EPAF Originator Summary
			Rohum to EPAE Monu
RELEASE: 8.9			
son Search			
heck the box to limit	t the search to an Employee. Ente	er the Last Name and or First	Name or enter an ID or enter the SSN/SIN/TIN Select Go A percent sign may be u
ildcard.	The search to an Employee. Ente	er the Last Name and OF his	Indine, of effet an D, of effet the SSN/SIN/Thy, Select OD. A percent sign may be u
ch Criteria			
ch Criteria			
ch Criteria loyee: □ Name: □			
ch Criteria loyee: Name: Name:			
ch Criteria loyee: Name: Name: Name:			
ch Criteria loyee: Name: Name:			
ch Criteria loyee: Name: Name: SIN/TIN:			
ch Criteria loyee: Name: Name: SINUTING			
ch Criteria loyee: Name: Name: Sin/Tin: rds per Page: 25			

Once you have pressed the magnifying glass icon you will land at the above form. Notice that you can search in 3 different ways for the employee's record that you will want to perform changes to. You can search by "Name", "900 number", or "Social Security Number". After the search information has been entered, CLICK "Go".

To search by using the name you can enter it in the fields provided then press the $\frac{G_0}{G_0}$ button. If you do not know the full name or don't know the proper spelling you can search by using a partial portion of their name. See the example below for how to enter a search using the % wild card search symbol. Click on "Go".

If the action is for an existing employee, click the "Employee" box to limit the search.



Now that you have searched and found the person you are performing a transaction on, select the EPAF that represents the personnel action you want to execute from the Approval Category drop down menu. Click on "Go".

Note: If the employee cannot be found you will not be able to perform any transaction at this time.

	services Not Selected		
Personal Informat	ion Alumnia Overload Spring - Current I	Faculty/Staff, OVERSP	
Search	Adjunct Rehire, AJREHI	cation non credit, CONTOL	
P	Adjunct Rehire Non Credit	Continuing Education, AJRECE	LEE MENU SITE MAP HELP EXIT
	Person Adjunct New Hire, AJNEW	ng Education, AJNEWC	
	Update Labor Distribution -	Academic Affairs, LABOR	After identifying an employee, click
Enter on ID o	Update Labor Distribution - Employee (Staff/Hourly) Te	Non Academic Affairs, LABOR1	menu to select the FPAE that
Ther an ID, s	Faculty Termination from D	ISU, FATERM	represents the desired personnel
🛊 - indicates a require	ed field. Salary and Title Change - S	Staff (Current Position), SALCHS	action needed.
ID: • 900044576	Muriel New Employee Biographica	al and Permanent Address, AEMBIO	
	One Time Pay (Overload F	aculty/Staff), 1PAYOL	
Query Date: MM	Campus Address Add/Cha	nge - Staff, CAADST	
Approval Catego	ory: 🙀 Not Selected		T
Go			
		EPAF Approver Summary	EPAF Originator Summary
		<u>Return to E</u>	EPAF Menu
DSU Online			
Personal Information	- Alumni and Friends Student and Financia	HAid Employee Services	
Search			
,	GO		
	Go	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT
New FPAF P	erson Selection	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT
New EPAF P	erson Selection	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT
New EPAF P	erson Selection	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT
New EPAF P	Go erson Selection ect the link to search for an ID, or generate ar	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT Approval Category. Select Go.
New EPAF P The enter an ID, sele * - indicates a required fi	erson Selection et the link to search for an ID, or generate an reld.	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT Approval Category. Select Go.
New EPAF P Tenter an ID, sele * - indicates a required fi D: 900044576	Go erson Selection act the link to search for an ID, or generate ar ield. Muriel D. Pagan	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT
New EPAF P Tenter an ID, sele + - indicates a required fi D: 900044576 Query Date: MM/D	Go erson Selection ct the link to search for an ID, or generate an ield. Muriel D. Pagan PYYYY 10/16/2014	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT
New EPAF P Tenter an ID, sele - indicates a required fi D: 900044576 Query Date: MM/DI Approval Category	Co	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT
New EPAF P Tenter an ID, sele - indicates a required fi D: 900044576 Query Date: MM/DI Approval Category Go	Go erson Selection act the link to search for an ID, or generate ar ield. Muriel D. Pagan PYYYY 10/16/2014 (*) One Time Pay (Overload Faculty)	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT
New EPAF P There are no indicates a required fine + - indicates a required fine 000044576 000046 00004576 000000000000000000000000000000000000	Co	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT
New EPAF P Tenter an ID, sele - indicates a required fi D: 900044576 Query Date: MM/D Approval Category Go There are no act All Jobs	erson Selection the link to search for an ID, or generate an ield. Muriel D. Pagan YYYYY 10/16/2014 One Time Pay (Overload Faculty) tive jobs based on the Query Date.	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT
New EPAF P There are no act Comparison of the select Comparison of	Co erson Selection act the link to search for an ID, or generate an ield. Muriel D. Pagan PYYYY 10/16/2014 Cone Time Pay (Overload Faculty) tive jobs based on the Query Date.	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT
New EPAF P Tenter an ID, sele The indicates a required fill D: 000044576 Query Date: MM/D Approval Category Go There are no act All Jobs	erson Selection act the link to search for an ID, or generate ar ield. Muriel D. Pagan YYYYY 10/16/2014 Cone Time Pay (Overload Faculty tive jobs based on the Query Date.	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT Approval Category. Select Go.
New EPAF P Tenter an ID, sele - indicates a required fi D: 900044576 Query Date: MM/DI Approval Category Go There are no act All Jobs	erson Selection et the link to search for an ID, or generate an ield. Muriel D. Pagan PYYYY 10/16/2014 One Time Pay (Overload Faculty) tive jobs based on the Query Date.	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT Approval Category. Select Go.
New EPAF P Finite an ID, seles - indicates a required fine - indicates	erson Selection act the link to search for an ID, or generate ar ield. Muriel D. Pagan YYYYY 10/16/2014 C One Time Pay (Overload Faculty) tive jobs based on the Query Date.	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT Approval Category. Select Go. iginator Summary
New EPAF P Tenter an ID, sele - indicates a required fi D: 900044576 Query Date: MM/DI Approval Category Go There are no act All Jobs	erson Selection et the link to search for an ID, or generate ar ield. Muriel D. Pagan PYYYY 10/16/2014 Cone Time Pay (Overload Faculty) tive jobs based on the Query Date.	RETURN TO EMPLOYEE MEN	iginator Summary
New EPAF P There are no act Comparison of the second sec	erson Selection et the link to search for an ID, or generate an ield. Muriel D. Pagan PYYYY 10/16/2014 One Time Pay (Overload Faculty) tive jobs based on the Query Date.	RETURN TO EMPLOYEE MEN	iginator Summary
New EPAF P Finder an ID, seles - indicates a required find D: 900044576 Query Date: MM/DI Approval Category Go There are no act All Jobs	erson Selection act the link to search for an ID, or generate ar ield. Muriel D. Pagan PYYYY 10/16/2014 C One Time Pay (Overload Faculty) tive jobs based on the Query Date.	RETURN TO EMPLOYEE MEN	NU SITE MAP HELP EXIT Approval Category. Select Go. iginator Summary 型
New EPAF P Tenter an ID, sele - indicates a required fr D: 900044576 Query Date: MM/DI Approval Category Go There are no act All Jobs	erson Selection et the link to search for an ID, or generate ar ield. Muriel D. Pagan PYYYY 10/16/2014 Cone Time Pay (Overload Faculty) tive jobs based on the Query Date.	RETURN TO EMPLOYEE MEN	iginator Summary

Selecting the Applicable Approval Category

Once you have selected a valid employee you need to select the correct processing approval category to apply. Here is a definition of all currently used EPAF at DSU.

#	CODE	EPAF APPROVAL CATEGORY	DESCRIPTION	CONTACT
1	D00001	Overload Pay	To pay a current DSU faculty/staff overload for teaching assignment during the fall and spring semesters – For Credit Courses only.	Human Resources
2	D00002	Overload Pay – Continuing Education	To pay a current DSU faculty/staff overload for teaching assignment during the fall and spring semesters – Courses taught through Continuing Education.	Human Resources
3	D00003	Adjunct Faculty Re-Appointment	To rehire an adjunct who has taught at DSU – For Credit Courses only.	Human Resources
4	D00004	Adjunct Faculty Re-Appointment – Continuing Education	To rehire an adjunct who has taught at DSU – Courses taught through Continuing Education.	Human Resources
5	D00040	Summer School Overload	To pay a current DSU faculty/staff overload for teaching assignment during the Summer School sessions – For Credit Courses only.	Human Resources
6	D00041	Summer School Overload – Continuing Education	To pay a current DSU faculty/staff overload for teaching assignment during the summer school sessions – Courses taught through Continuing Education.	Human Resources
7	D00042	Summer School Adjunct Re-Appointment	To rehire an adjunct who has taught at DSU – For Credit Courses for summer school only.	Human Resources
8	D00043	Summer School Adjunct Re-Appointment – Continuing Education	To rehire an adjunct who has taught at DSU – Courses taught through Continuing Education for summer school only.	Human Resources
9	D00044	Summer School Overload – Courses Taught During Over Sessions	To pay a current DSU faculty/staff overload for teaching assignment over <u>BOTH</u> summer school sessions – For Credit Courses only.	Human Resources
10	D00045	Summer School Overload – Continuing Education – Courses Over During Both Sessions	To pay a current DSU faculty/staff overload for teaching assignment during the summer school sessions – Courses taught through Continuing Education over <u>BOTH</u> summer school sessions.	Human Resources
11	D00046	Summer School Adjunct Re-Appointment – Courses Taught Over Both Sessions	To rehire an adjunct who has taught at DSU – For Credit Courses over <u>BOTH</u> summer school sessions.	Human Resources
12	D00047	Summer School Adjunct Re-Appointment – Continuing Education – Courses Taught Over Both Sessions	To rehire an adjunct who has taught at DSU – Courses taught through Continuing Education over <u>BOTH</u> summer school sessions.	Human Resources
13	D00007	One Time Payment – Extra Services (Non Academic Affairs)	To pay an employee additional pay for extra services performed outside their normal job duties.	Human Resources
14	D00008	One Time Payment – Extra Services (Academic Affairs)	To pay an employee additional pay for extra services performed outside their normal job duties.	Human Resources
15	D00009	Termination from DSU (Academic Affairs)	To end the employment of an employee who has resigned or been terminated.	Human Resources
16	D00010	Termination from DSU (Non Academic Affairs)	To end the employment of an employee who has resigned or been terminated.	Human Resources

DSU EPAFS

17	D00015	Job Labor Distribution Change (Academic Affairs)	To change the fund, org, and/or account to which an employee's salary is charged	Human Resources
18	D00016	Job Labor Distribution Change (Non Academic Affairs)	To change the fund, org, and/or account to which an employee's salary is charged	Human Resources
19	D00022	Campus Address Change (Academic Affairs)	To change the campus address of an employee.	Human Resources
20	D00023	Campus Address Change (Non Academic Affairs)	To change the campus address of an employee.	Human Resources

How to Enter Routing Queue Manually

In this section you tell the system who will approve and apply the EPAF. To select a person click on the magnifying glass icon and select the appropriate approving manager for your department that is authoring this transaction. If they do not appear on this list, please contact your HR office for inclusion.

Some routing queues are pre-established and cannot be changed.

Mary Ruth Phillips in Payroll is the only applier.

Routing Queue

Approval Level	User Name		Required Action Remove
90 - (HR) Human Resources	Q LGIGER	Lisa Weeks Giger	Approve
99 - (SUPER) Superuser	🔍 LGIGER	Lisa Weeks Giger	Apply
5 - (DEPT) Director/Supervisor	▼ Q,		Not Selected
Not Selected	▼ Q		Not Selected
Not Selected	▼ Q		Not Selected
Not Selected	▼ Q		Not Selected

How to Create a Default Routing Queue

The next section is setting up a default routing queue for your EPAFs. In this section you define/tell the system which personnel will approve and apply each EPAF in advance.

Once the EPAF is selected for a transaction, the routing queue will automatically populate with the pre define selections. To setup the default routing queue, click on the EPAF Originator Summary from the main EPAF Menu. Once at the summary page click on the Default Routing Queue blue link at the center of the screen above the EPAF transactions listing.

Search Go RETURN TO EMPLOYEE MENU SITE MAP HELP EXT Electronic Personnel Action Form EPAF Agenerat Summay EPAF Originator Summay RELEASE 33 SUIDINE services Search Go RETURN TO EMPLOYEE MENU SITE MAP HELP EXT EPAF Proxy Records Add as a Proxy RELEASE 3 SUIDINE services Current History Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction EPAF Menu Current History Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction Euron to EMPLOYEE MENU SITE MAP HELP EXT EPAF Originator Summary Current History Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction Return to EMPLOYEE MENU SITE MAP HELP EXT EPAF Menu Current History Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction Return to EMPLOYEE MENU SITE MAP HELP EXT EPAF Menu Current History Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction Return to EPAF Menu Current History Current History Current History Return to EMPLOYEE MENU SITE MAP HELP EXT AT Default Routing Queue At Default Routing Queue At A Select the Approval Level, User ID and action. Current History At Select the Approval Level, User ID and action. Current History At Select the Approval Level, User ID and action. Current History At Select the Approval Current Midde and France Level the Approval Level, User ID and action. Current History At Select the Approval Current Midde and France Level the Approval Level, User ID and action. Current History At Select the Approval Current Midde and France Midde and France Midde and Mi		T Alumni and Thends Studer	
Electronic Personnel Action Form EAL Areasers Summary EAL Areaser	Search	Go	RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT
EPAE-Agreeves Summary Pare Provy Records Add as a Proxy Records Relates a Proxy Records Records Relates a Proxy Records Relat	Electronic Pe	ersonnel Action Forn	n
EPAF Conjunctor Summary EPAF Conjunctor Summary EPAF Conjunctor Summary EPAF Conjunctor Summary ERLEASE: 3			
	EPAE Approver Sur	mmary	
EPAF Proxy Records Act as a Proxy RELEASE: 83	New EPAF	minury	
Act as a Proxy RELEASE: 8.3	EPAF Proxy Record	ds	
RELEASE 3.9 Search Go RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT EPAF Originator Summary Current History Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction. Transaction Status: All Go New LOVE [Default Routing Queue] Such Superuser or Filter Transactions Return to EPAF Menu Online services Return to EPAF Menu Return to EP	Act as a Proxy		
	RELEASE: 8.9		
Consistent minimitation relations equivalent and in manufact rates Search Go RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT EPAF Originator Summary Current History Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction. Transaction Status Aligne Go New LAF Default Routing Queue Sarch Superuser or Filter Transactions Return to EPAF Menu Online services Return to EPAF Menu Online services Return to EPAF Menu Second and Proved Level, User ID and action. Return to EPAF Queue Return to EPAF Menu Second and Proved Level, User ID and action. Return to Selected Return to Selected Return to EPAF Menu Return to EPAF Menu Second and Proved Level, User ID and action. Return to Selected Return to Selected Return to Selected Return to Selected Return to EPAF Menu Second and Proved Level, User ID and action. Return to Selected Return to Selected Return to Selected Return to EPAF Menu	SU Online serv	rices	and Encoded Atd. Encodermon Sectors
Current History Current History Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction. Transaction Status All Go New Leve Default Routing Queue Select h Superuser or Filter Transactions Return to EPAF Menu	Search		
EPAF Originator Summary Current History Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction. Transaction Status: Multipe Go New RAE [Default Routing Queue] Such Superuser or Filter Transactions Return to EPAF Menu	Search		RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT
Current History Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction. Transaction Status: Aliging Go New LCAE [Default Routing Queue] Sorth Superuser or Filter Transactions Return to EPAF Menu		tor Summary	
Current History Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction. Transaction Status Ali Go New text Default Routing Queue Sarch Superuser or Filter Transactions Return to EPAF Menu Colline services Colline services Return to EPAF Menu Colline services Return to EPAF Menu Colline services Return to EPAF Menu Colline services Colline servic	EFAF Oligilia	or Summary	
Current History Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction. Transaction Status: All Comparison of			
Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction. Transaction Status All Go Waiting Go New LAE Default Routing Queue Sarch Superuser or Filter Transactions Return to EPAF Menu Colline services Tetimiomation Nummi and Finends Student and Finendal Add Imployee Services Tetimiomation Nummi and Finends Student and Finendal Add Imployee Services Tetimiomation Nummi and Finends Student and Finendal Add Imployee Services Tetimiomation Nummi and Finends Student and Finendal Add Imployee Services Tetimiomation Nummi and Finends Student and Finendal Add Imployee Services Tetimiomation Nummi and Finends Student and Finendal Add Imployee Services Tetimiomation Nummi and Finends Student and Finendal Add Imployee Services Tetimiomation Nummi and Finends Student and Finendal Add Imployee Services Tetimiomation Nummi and Finends Student and Finendal Add Imployee Services Tetimiomation Nummi and Finends Student and Finendal Add Imployee Services Tetimiomation Nummi and Finends Student and Finendal Add Imployee Services Tetimiomation Nummi and Finends Tetimiomation Numm	Current History		
Transaction Status: AllGo New RAF Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu Online services Return to EMPLOYEE MENU SITE MAP HELP EXIT AF Default Routing Queue New Return to EMPLOYEE MENU SITE MAP HELP EXIT AF Default Routing Queue Net Selected Net Selected Isser Name Required Action Not Selected	Select the link und	ler Name to access details of	the transaction, or select the link under Transaction to update the transaction.
	Transaction Status		
	mansaction otatus.	Waiting -	
			New IDAE Default Deuting Queue Several Supervises or Filter Transactions
			New LCAF Default Routing Queue Sourch Superuser or Filter Transactions
Online services met Information Numni and Friends Student and Financial Aid Imployee Services ch Go RETURN TO EMPLOYEE MENU_SITE MAP_HELP_EXIT AF Default Routing Queue select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action. oval Category Not Selected Selected Selected Oval Level Selected Oval Category Not Selected			New IPAF Default Routing Queue Search Superuser or Filter Transactions
			New ROAF Default Routing Queue Search Superuser or Filter Transactions
Control Category Not Selected Selected Selected Not S			New ROAF Default Routing Queue Search Superuser or Filter Transactions
AF Default Routing Queue elected Very Constraint of the page refreshes, select the Approval Level, User ID and action. Total Category Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and action. Total Category Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and action. Total Category Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and action. Total Category Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and action. Total Category Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and action. Total Category Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and action. Total Category Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and action. Total Category Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and action. Total Category Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and action. Total Category Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and action. Total Category Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and action. Total Category Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and action. Total Category Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and action. Total Category Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and Action. Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and Action. Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and Action. Not Selected Very Constraint of the page refreshes, select the Approval Level, User ID and Action.	Online services	-	New EPAF Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu
AF Default Routing Queue elect an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action. toval Category Not Selected toval Category Not Selected toval Level User Name Required Action Not Selected Not Select	Online services	d Friends [®] Student and Financial Aic	New EPAF Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu
elect an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action. oval Category: Not Selected Go oval Queue	Online services net Information [®] Alumni an ch	d Friends [®] Student and Financial Au Go	New LOAF Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu
alect an Approval Category and Go. Once the page retresnes, select the Approval Level, User ID and action.	Online services net Information [®] Alumni an ch	d Friends [,] Student and Financial Arc Go	New LOAF Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu
Val Category Not Selected oval Queue oval Level User Name Required Action Selected Selected Selected Selected Selected Selected Val Not Selected Val Val Val Val	Online services net information Atomin and oh C	d Financial Aud Go g Queue	New LOAF Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu
Oval Queue Required Action Oval Level User Name Required Action Selected Q Not Selected Not Selected	Online services mel Information [®] Alumni and ch ch ch AF Default Routing elect an Approval Category	d Friends [®] Student and Financial Ac Go g Queue and Go. Once the page refreshes, s	New BOAF Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu
Val Level User Name Required Action Selected V Not Selected Selected V Not Selected Selected V Not Selected Selected V Not Selected	Confine services and Information Alumni an oh a AF Default Routing elect an Approval Category oval Category: Not Selec	d Finands [®] Student and Financial Arc Ga g Queue and Go. Once the page refreshes, s ted	New BOAF Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu
Selected	Online services and information [®] Alumni and eh AF Default Routing elect an Approval Category roval Category Not Select py al Queye	d Friends ^a Bludent and Financial Ac Go g Queue and Go. Once the page refreshes, s	New EPAF Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu F
Selected Not Selected Not Selected Not Selected Not Selected Not Selected Selected Not Selected Select	Contine services met Information [®] Alumni and ch Contine AF Default Routing elect an Approval Category roval Category Not Select oval Queue roval Queue roval Level	d Friends [®] Student and Financial Ave Co g Queue and Go. Once the page refreshes, s ited	New EPAF Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu F Employee Services RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT select the Approval Level, User ID and action. •
Solostod Value Not Selected	Contine services The Information Alumni and the AF Default Routing elect an Approval Category roval Category Not Select roval Queue roval Level Selected	d Friends [®] Student and Financial Ave Go g Queue and Go. Once the page refreshes, s ited	New EPAF Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu F
Not Volootog	Online services Trait Information* Atamni an Sector AF Default Routing elect an Approval Category Not Select oval Category Not Select oval Level Selected Selected Selected Selected Selected Selected	d Friends [®] Student and Financial Ave Go g Queue and Go. Once the page refreshes, s ited	New ECAF Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu F Employee Services RetURN TO EMPLOYEE MENU SITE MAP HELP EXIT select the Approval Level, User ID and action. Go Required Action Not Selected Not Sel

Once at the Default Routing Queue screen, click the drop down menu and choose an EPAF to predefine the Approval Queue.

EPAF Default Routing Queue

Relect an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category:	Not Selected	Go	
	Not Selected		
	Overload Spring - Current Faculty/Staff, OVERSP		
Approval Queue	Overload - Continuing Education Non Credit, CONTOL		
Approval Level	Adjunct Rehire, AJREHI		Required Action
Not Selected	Adjunct Renire Non Credit Continuing Education, AJRECE		Not Selected •
Not Selected	Adjunct New Hire Continuing Education, AJNEWC		Not Selected
Not Selected	Update Labor Distribution - Academic Affairs, LABOR		Not Selected -
Not Selected	Employee Termination from DSU (Staff/Hourly), EMTERM		Not Selected
Save and Add New R	Faculty Termination from DSU, FATERM Salary and Title Change - Staff (Current Position), SALCHS Salary and Title Change - Hourly (Current Position), SALCHH New Employee Biographical and Permanent Address, AEMBIO One Time Pay (Overload Faculty/Staff), IPAYOL Campus Address Add/Change - Faculty, CAADCH Campus Address Add/Change - Staff, CAADST	Originator Summary	

In the Approval Level column, click the drop down menu to choose the level and category for each approval need to process the action completely.

Once you have identified the level and category of the Approval Level needed, **click the magnifying class** \bigcirc **to select the corresponding User Name for each approval level** identified and the Required Action for each User Name.

NOTE: The **system may mandate certain default approvers and appliers for all transactions**, such as Human Resource Approver, Human Resource Applier and Budget Approver.

EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category: Summer School Overload, D00040 v Go

Approval Queue						
Approval Level	l	Jser Name		Required Action	R	lemove
10 - (CHAIR) Chair	~ (2		Approve v	<i>,</i> [2
15 - (DEAN) Dean	~ (2		Approve v	/ C	2
39 - (ACAFF1) Academic Affairs (Hayley)	~ (HMURRELL	Hayley H Murrell	Approve v	/ [3
40 - (ACDAFF) Academic Affairs	~ (CBALLARD	Cheryl M Ballard	Approve ~	20]
45 - (PROVOS) Provost of Academic Affairs	~ (CMCADAMS	Charles Alan McAdams	Approve v	/ [3
50 - (HRFYI) HR FYI	~ (SMPHILLIPS	Samantha Myers Phillips	FYI v	20]
65 - (BUDGET) Budget Office	~ (BLINDSEY	Beverly Coons Lindsey	Approve v	/ [3
70 - (PAYROL) Payroll FYI (Monthly)	~ (MPHILLIPS	Mary Ruth Phillips	FYI	20]
75 - (HRDIR) Human Resource Director	~ (LGIGER	Lisa Weeks Giger	Approve v	/ [3
99 - (SUPER) Superuser	~ (MPHILLIPS	Mary Ruth Phillips	Apply ~	20]
Not Selected	~ (2		Not Selected		
Not Selected	~ (2		Not Selected		
Not Selected	~ (Search		Not Selected		
Not Selected	~ (2		Not Selected	-	

Save and Add New Rows

How to Review the History of Originators Transactions and Their Statuses

From the first web page you enter you will see the links to navigate. Click on the link labeled "EPAF Originator Summary" - see sample below.

New EPAF Person Selection	
Enter an ID, select the link to search for an	n ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go
∗ - indicates a required field.	
ID: 🙀	å Q
Query Date: MM/DD/YYYY 10/17/2014	
Approval Category: 🞍 Not Selected	•
Go	
	EPAF Approver Summary EPAF Originator Summary
	Return to EPAF Menu

You may look at your EPAF by transaction status by clicking on the Originator Summary link. From this point you can see their status. You can look at any of the details for any given employee in the list.

		New	EPAF Default Routing Queue Search Sup	eruser or Filter Trans	actions		
			Return to EPAF Menu				
1 - 2 of 2							
EPAE Transactions							
∧ Name ▼	▲ ID ▼	▲ Transaction ▼	A Type of Change ▼	▲ Submitted Date ▼	▲ Effective Date ▼	▲ Transaction Status	Links
<u>Donovan, Rylee C.</u> Assistant Professor of Art, 000003-00	900114402	<u>19</u>	Update Labor Distribution - Academic Affairs		Oct 01, 2014	Waiting	<u>Commen</u>
Yarbrough, Teresa B. Miscellaneous Position, 004031-00		<u>85</u>	One Time Pay (Overload Faculty/Staff)		Oct 01, 2014	Waiting	Commen

Return to EPAF Menu

If you click on the person's name you will see the details entered. Note that you can void or delete this transaction. Delete will remove the process from the system and will not be processed. If you void it, the transaction detail is kept but will not be processed.

If you need to update this transaction you can do so by clicking the "Update" button. Once you update the transaction you must save and Submit again to process your changes. NOTE: this can be done until the transaction is approved. After that, only the approver can return the EPAF to you for correction and then you can update and resubmit.

EPAF Preview



Labor Distribution - Update if Needed, 000003-00 Assistant Professor of Art

COA Ind	lex Fund	d Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encun	nbranc	e Over	ride En	d Dai
1	10	3006	61200	0101					100.00					
Vew														
Effective	e Date: 1	10/01/2014												
COA Ind	lex Fund	d Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encun	nbranc	e Over	ride En	d Dat
1	10	0305	61200	0101					00					
									.00					
D a 41 a	0													
Routing	Queue	Name		Dequi	red Action		atue Act	ion Da						
Routing Approval Human Re	Queue Level	Name	Giger Gl	Requi	red Action	<mark>Queue Sta</mark> In the Que	atus Act	ion Da	te					

Created: Oct 06, 2014 Lisa Weeks Giger

How to Process an Overload Pay and Overload Pay (Continuing Education)

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to process an overload for current faculty/staff employees and for adjuncts, which already have an active job for the semester. The steps below should be followed:

- 1. Enter the employee's 900# or click on the \bigcirc magnifying glass to search for an employee's 900#.
- 2. The query date will default to today's date. Change the query date to:
 - Fall Semester: 09/01/2018 or 09/01/20___
 - o Spring Semester: 02/01/2018 or 02/01/20___
- 3. Select Overload Pay or Overload Pay (Continuing Education) from the drop down approval category box.

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DATE YOU WANT THE TRANSACTION TO TAKE PLACE. IF IT IS NOT SET TO THE CORRECT DATE (LISTED ABOVE), IT WILL CAUSE AN ERROR AND YOU WILL HAVE TO RESTART THE EPAF.

DSU	online service	ces		_			
Persona	Information A	lumni and Friends Student	and Financial Aid Em	ployee Services			
Search		Go		RETURN TO EMPLO	YEE MENU	SITE MAP HELP EXIT	
New	EPAF Per	son Selection					
🖵 Ente	r an ID, select	the link to search for an ID,	or generate an ID. En	er the Query Date and s	elect the App	proval Category. Select Go.	
* - indica	ites a required field	I.					
ID: 🗰 9	00114402	Rylee Cassandra Donovan	\$ Q				
Query Query	Date: MM/DD/Y al Category: #	02/01/2015 Overload Pay, D000	001		<u></u>	After identifying an employee, click the Approval Category drop down menu to the EPAF for Overload Pay and/or Over	select load
Go						Pay (Continuing Education – Non Cred	it).
Employ	ee Job Assign	ments	ing Object Opporting		4- I D-:		
Primary	000003 00	Assistant Professor of Art 0	507, Teacher Educatio	n Aug 15, 2013	te Last Paid	Active	
All Job	/5 ←				_		
						The Employee Job Assignments show active positions. By clicking the All Job button, it will display all current and pr	all os evious
						jobs.	

4. Click on "Go" to begin the Overload Pay and/or Overload Pay (Continuing Education - Non Credit) EPAF.

5. Enter the correct position numbers in the format indicated below and click on "GO". If a position number has already been assigned to the employee, select the radial dial at the end of the line and click on "GO". It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.

Position #:	Suffix #:	Description
000458	00	Overloads paid for credit hour courses.
004025	00	Overloads paid by other funds (not grants). The fund #s usually start with 108.
004030	00	Overloads paid by grant funding. The fund #s usually start with 3.
000478	00	Overloads paid by Continuing Education. The section numbers will start with a "c".
		Example: Section c21

	ch	Go		RETURN TO EM	MPLOYEE MENU	SITE MAP H	ELP EXIT		
Nev	w EPAF Job Sele	ection							
e En	nter or search for a new i	position number an	d enter the suffix.	or select the link under Tit	le.				
ID:	Rvlee C	assandra Donovan.	900114402						
Ouror	D.I. ELOI	0015							
Quer	y Date: Feb 01,	2015							
Appro	y Date: Feb 01, J oval Category: Overload	2015 I Pay, D00001							
Appro	y Date: Feb 01, . oval Category: Overload	2015 I Pay, D00001							
Appro Overle	oval Category: Overload	2015 I Pay, D00001							
Appro Overlo Searc	oval Category: Overload	1 Pay, D00001		Time Sheet Organization	Start Date	End Date Last	Paid Date Sta	tus Select	
Appro Overle Searc	oval Category: Overload Add Job, OVERSP th Type Solition New 6b 000458	2015 I Pay, D00001 Sun Title	or / Gen Acad Inst	Time Sheet Organization tr3001, General Instruction	Start Date	and Date Last	Paid Date Sta		

6. View Employee Class:

- This section allows the originator to view the current employee's employment information.
- Employment Status must equal (A) Active.
- o If employment status is listed something else other than Active, do not use this EPAF.
- Listed below are the definitions of the Employee Class Code
- These fields are not able to be changed.

Employee Class Description	Employee Class Definition	Payroll ID
F1, Faculty 9/12	Faculty employee employed for 9 months and paid over 12 months	M1 payroll
F2, Faculty 9/9	Faculty employee employed for 9 months and paid over 9 months	M2 payroll
F4, Faculty 12/12	Faculty employee employed for 12 months and paid over 12 months	M1 payroll
S1, Full Time Staff	Staff employee employed for 12 months and paid over 12 months	M1 payroll
F3, Faculty PT < 9 months	Adjunct faculty	Do not used this EPAF

* - indicates a required field.

View Employee Employment Class

Item	Current Value	New Value
Employee Class Code: (Not Enterable)	F1, Faculty 9/12	<
Employee Status: *(Not Enterable)	Active	A

7. Enter Overload Pay Information

Field	Statement/Action	Action/Example
Job Begin Date:	If statement below says "Last Paid Date:"then	Leave field blank
	Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 Overload ENG 10 Last Paid Date: May 31, 2014	
	Item Current Value	
	Job Begin Date: MM/DD/YYYY	
		F (
	If statement below says "PT Instructor/Gen Acad Instr",then	Enter: (enter corresponding
	Overload Spring 2015 Current ET Escultu/Staff 000/58 0 PT Instructor / Gen Acad Instr	year)
	ovendau Spring 2010 Current PT racutystan, 000400-00 PT instructor / Gen Acad inst	00/01/20 for Fall
	Item Current Value New Value Job Begin Date: MM/DD/YYYY	Semester
		02/01/20 for Spring Semester
Job Effective Date:	Field cannot be changed. Information is defaulted.	
Job Personnel Date:	Field cannot be changed. Information is defaulted.	
Title:	Enter the course information for the overload that is being paid.	Example:
		Overload ENG 101
Annual Salary:	Total amount to be paid for course overloads	3000.00
FTE:	FTE for overload is calculated as follows:	Enter the number FTE
	25 = 1 course overload 75 = 3 course overload	for the number of course overloads:
	.50 = 2 course overload $1.00 = 4 course overload$	
	To figure FTE divide the amount to be paid by 12,000 Example: \$300/\$12,000 = .025	Example: .25
Contract Type	Field cannot be changed. Information is defaulted.	
Employee Class Code	Field cannot be changed. Information is defaulted.	
Payroll ID	Payroll ID will default to M1. Field can be change. If the employee class under the "View Employee	Payroll ID M1 should
	Employment Class" is F1, F4, or S1then	remain defaulted.
	If the employee class under the "View Employee Employment Class" is F2then	Use the drop down box to change to M2.
	View Employee Employment Class	5
	Item Current Value New Value Employee Class Code: (Not Entera le) F1. Faculty 9/12	
	Employee Status: *(Not Enterable)	
Leave Rept Pay ID	The Leave Report Pay ID should match the Payroll ID above.	Match Leave Rept Pay ID to Payroll ID (either M1 or M2)
Job Change Reason	Field cannot be changed. Information is defaulted.	
Step	Field cannot be changed. Information is defaulted.	
Job Status	Field cannot be changed. Information is defaulted.	

Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 PT Instructor / Gen Acad Instr



8. Update Factor, Pays, and Hours

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Update Factors, Pays, and Hours, 000458-00 Overload ENG 101, Last Paid Date: May 31, 2014

Item	Current Value	New Value		
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		02/01/2015		
Factor: (Not Enterable)		4		No Action Needed
Pays: (Not Enterable)		4	-	
Hours per Pay: (Not Enterable)		84	•	

9. Terminate Employee Job

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Terminate Employee Job, 000458-00 Overload ENG 101, Last Paid Date: May 31, 2014



10. Labor Distribution – Update if Needed

- o In the "CURRENT" section the current labor codes and the effective date of the last change will default into the form.
- In the "NEW" section add new rows or make changes to the existing rows.
- Changes to the accounting information will be <u>LIMITED</u>. The correct accounting information should default in the field according to the position number being used.
- The fund, organization, account, and program codes will <u>NOT</u> need to be change unless payment is being charged by grant or other funds.
- EFFECTIVE DATE: The effective date should equal either: 09/01/20_ (Fall) or 02/01/20_ (Spring) depending on the semester.
- o Apply the appropriate changes to the field if necessary.

Steps to change Labor Distributions

1. Change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.



- 2. Enter the new accounting information. The following must be entered for each line.
 - a. COA = enter 1.
 - b. Fund No.
 - c. Organization No.
 - d. Account No. = 61200
 - e. Percentage = totals must equal 100%. See sample below

Click to "Save and Add New Rows"



- 3. Click on the box under the "Remove" Column to remove the old accounting information. The percentage should be set 0.00%.
- 4. Click on Save and Add New Rows. The old accounting information should be removed.

					Location	Filleor	COSE	Percent	Date	itu Kelilöve	Click the remove button
<u>ا</u> م	3001	61200	Q 0101	٩,				.00			the line that has 0.00%
10	3001	Q 61200	Q 0101	٩				30.00			entered. Then click on "S
340231	3001	Q 61200	Q 0101	٩				70.00			and Add New Rows.
<u>م</u>	۹.	٩	Q,	٩							
	م 	Q									
× ↓ (مر مر		- 0 - 0								
1	1	1	1	1		1	Total:	100.00			
	• 10 • 340231 • - • - • - • - • -	10 Q 3001									

Update Curren Effectiv COA	e Labor D t ve Date: 02 idex Fund	Distributions, /01/2015 Organization A	000458-00 PT I ccount Program	nstructor / (Activity Loca	Gen Acad Ins	str st Percent Enc	umbrance Ove	erride End Da	ate			
New Effectiv	/e Date: Mi	M/DD/YYYY 02/	01/2015									
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End	Remov
Q 1		Q 10	3001	61200	Q 0101	٩,				30.00		
Q 1		Q 340231	Q 3001	Q 61200	Q 0101	٩				70.00		
۹L	_	_ Q	- Q	Q	_ Q	_ Q				_		
	-		- Q	Q	- Q	- Q				-		
	-			Q		_ Q			_	-		
	-	_ Q	- Q	Q	- a	_ Q		-		-		
	,	,	,	,	,		,		, Total:	100.00		

11. Routing Queue

- In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- For Overloads, all EPAFs must have a Chair and Dean level approval.
- For Grants, <u>all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office</u>. Other approval levels will default.
- For Continuing Education courses, add <u>Dean, Graduate and Continuing Education and Continuing Education (Marilyn</u> <u>Read).</u>

Approval Queue				
Approval Level	User Name		Required Action	Remove
10 - (CHAIR) Chair	~ Q.		Approve v	•
15 - (DEAN) Dean	~ Q.		Approve •	· 🗆
39 - (ACAFF1) Academic Affairs (Hayley)	V HMURRELL	Hayley H Murrell	Approve 🗸	•
40 - (ACDAFF) Academic Affairs	CBALLARD	Cheryl M Ballard	Approve v	. 🗆
45 - (PROVOS) Provost of Academic Affairs		Charles Alan McAdams	Approve •	· 🗆
50 - (HRFYI) HR FYI	V Q SMPHILLIPS	Samantha Myers Phillips	FYI	. 🗆
65 - (BUDGET) Budget Office		Beverly Coons Lindsey	Approve •	· 🗆
70 - (PAYROL) Payroll FYI (Monthly)	V MPHILLIPS	Mary Ruth Phillips	FYI	. 🗆
75 - (HRDIR) Human Resource Director	✓ Q LGIGER	Lisa Weeks Giger	Approve •	· 🗆
99 - (SUPER) Superuser	V MPHILLIPS	Mary Ruth Phillips	Apply v	. 🗆
Not Selected	~ Q.		Not Selected	•
Not Selected	~ Q.		Not Selected	
Not Selected	✓ Search		Not Selected	•
Not Selected	~ Q.		Not Selected	

Save and Add New Rows

12. Click on the "Save and Add New Rows".

13. Comments

- o In the "Comments" section, enter comments for the approvers with an explanation for the action.
- In the "Comment" section, also enter the following for overload information:
 - CRN #:
 - Credit Hour:
 - Course Number:
 - Course Title:
 - Section:
 - Enrollment:
 - Reason for Overload:

Comment



Enter additional information here.

Enter: CRN #: | Credit Hour: | Course #: | Course Title | Section: | Enrollment: | Reason for Pay: include whether the course is offered through Continuing Education.

14. Save EPAF

- Hit the "Save" Button at the bottom of the form.
- Return to the top of the form.
- The message should display "Your change was saved successfully."
- o Check your date entry

Electronic Personnel Action Form



15. Submit EPAF

- Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
- The EPAF automatically routes to the approvers in the order of their approval levels.

Electronic Personnel Action Form



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Errors	and	Warning	g Messa	qes

Туре	Message Type	Description
Add Employee Job	WARNING	*WARNING* This employee is terminated on the Employee Form.
Add Employee Job	WARNING	*WARNING* The Employee's Term Date and Reason should be removed from PEAEMPL.
Add Employee Job	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
Update Factors, Pays and Hours	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
in discussion of the discussion of Could		

* - indicates a required field.

Delete

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

How to Process an Adjunct Rehire and Adjunct Rehire (Continuing Education)

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to rehire an adjunct. The steps below should be followed:

- 1. Enter the employee's 900# or click on the \bigcirc magnifying glass to search for an employee's 900#.
- 2. The query date will default to today's date. Change the query date to:
 - Fall Semester: 09/01/2018 or 09/01/20___
 - o Spring Semester: 02/01/2018 or 02/01/20___
- 3. Select Adjunct Rehire or Adjunct Rehire (Continuing Education) from the drop down approval category box.

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DATE YOU WANT THE TRANSACTION TO TAKE PLACE. IF IT IS NOT SET TO THE CORRECT DATE (LISTED ABOVE), IT WILL CAUSE AN ERROR AND YOU WILL HAVE TO RESTART THE EPAF.

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: 900114404 Oliva Caden Silver		
Query Date: MM/DD/YYY 02/01/2015 Approval Category: Adjunct Faculty Re-Appointment, D00003 Go	←	After identifying an employee, click the Approval Category drop down menu to select the EPAF for Adjunct Rehire and/or Adjunct Rehire (Continuing Education – Non Credit).
Employee Job Assignments Type Position Suffix Title Time Sheet Organization Start Date End Date Last Pa Secondary(000478 00 Adjunct Instr Teach Ed 0387, Social Science Feb 01, 2015 May 31, 2015	aid Date Status Active	
All Jobs	The Employ active posit button, it w jobs.	ree Job Assignments show all ions. By clicking the All Jobs ill display all current and previous

- 4. Click on "Go" to begin the Adjunct Rehire and/or Adjunct Rehire (Continuing Education Non Credit) EPAF.
- 5. Click on the button "All Jobs".
- Select the position in which to reactivate by clicking on the radial dial at the end of the row. The position to reactivate will usually be position 000458 for credit courses and 000478 for Continuing Education – Non Credit courses. The position to be reactivated will usually be the primary type.
- If the employee does not have a job with the correct position number, then enter the position number in the format indicated below and click on "GO". It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.

Position #:	Suffix #:	Description
000458	00	Overloads paid for credit hour courses.
004025	00	Overloads paid by other funds (not grants). The fund #s usually start with 108.
004030	00	Overloads paid by grant funding. The fund #s usually start with 3.
000478	00	Overloads paid by Continuing Education. The section numbers will start with a "c".
		Example: Section c21

To Add a New Position - Screen Shot

New EPAF Job Selection

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



Add Employee Job, ADDJOB

Search	Туре	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job	000458	00	PT Instructor / Gen Acad Instr	3001, General Instruction					
										•
	Secondary	000478	00	Adjunct Instr Teach Ed	0387, Social Science	Feb 01, 2015	May 31, 2015		Active	
										0
All Jo	bs									
Next	Approval Ty	e Go								

To Re-activate a Position – Screen Shot

New EPAF Job Selection

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



Add Employee Job, ADDJOB

Search	Туре	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job									_
										0
	Primary	000458	00	Adjunct Instr Social Scie	0387, Social Science	Sep 01, 2014	Dec 31, 2014		Active	
	· · ·			,		• •	,			•

Next Approval Type Go

To Activate a Grant Position - Screen Shot

New EPAF Job Selection

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

ID:	Oliva Caden Silver, 900114404
Query Date:	Oct 09, 2014
Approval Category:	Adjunct Rehire***, AJREHI

Add Employee Job, ADDJOB

Search	Туре	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Selec	
Q	New Job	004030	00	Adjunct Instructors	41211, Other General Institutional						
	Primary	000458	00	Adjunct Instr Social Scie	0387, Social Science	Sep 01, 2014	Dec 31, 2014		Active	_	
										O	
	Secondary	000478	00	Adjunct Instr Teach Ed	0387, Social Science	Feb 01, 2015	May 31, 2015		Active		1
										O	
All Jo	bs										-
Next /	Approval Typ	e Go									

Enter Adjunct Employment Record – See table below for instructions.

Field	Statement/Action	Action/Example
Home Organization	Change if needed. A change is usually not needed	0387
Distribution Org	Change if needed. If Home organization is change, then distribution	
	org must match home org.	
Current Hire Date	Field cannot be changed. Information is defaulted.	No action needed
Employee Status	Field cannot be changed. Information is defaulted.	No action needed
Employee Class Code	Enter the following if needed: (Usually a change is not needed)	
	F3=adjunct employee	F3
	RT=reemployment of PERS retiree	
Home COAS	Field cannot be changed. Information is defaulted.	No action needed
Term Reason Code:	Field cannot be changed. Information is defaulted.	No action needed
Terminate Date:	Field cannot be changed. Information is defaulted.	No action needed
Last Work Date:	Field cannot be changed. Information is defaulted.	No action needed

An * is a required field.

Adjunct Employment Record

Item	Current Value	New Value
Home Organization:	0387, Social Science	Q.
Distribution Orgn:	0387, Social Science	0
Current Hire Date: MM/DD/YYYY(Not Enterable)	09/01/2014	
Employee Status: *(Not Enterable)	Terminated	A
Employee Class Code:	F3, Faculty P/T < 9 Months	Q,
Home COAS: *(Not Enterable)	1	1
Term Reason Code: *(Not Enterable)	JE, Job ends	JE
Termination Date: MM/DD/YYYY*(Not Enterable)	12/31/2014	05/31/2015
Last Work Date: MM/DD/YYYY*(Not Enterable)		-

8. Add Employee Job – See table below for instructions

Field	Statement/Action	Action/Example
Job Begin Date:	In the Current Value Column, if the current information is population, then —————	Leave field blank
-	Add Employee Job, 000458-00 Adjunct Instr Social Scie	
	Item Current Value Yalue	
	Job Begin Date: MM/DD/YYYY(Not Enterable) 09/01/2014	
	Jobs Effective Date: MM/DD/YYY(Not Enterable) 09/01/2014 02/01/2015	
	Contract Type: Primary Primary V	
	Title: * Adjunct Instr Social Scie	
	Annual Salary: * 3000	
	Employee Class Code: *(Not Enterable) F3, Faculty P/T < 9 Months F3	
	Payroll Id: *(Not Enterable) M2	
	Leave Rept Pay ID: *(Not Enterable) M2 M2	
	Step: (Not Enterable) 0 0	
	Job Status: (Not Enterable) Active A	
	To Add Position Number:	Enter:
	If Adjunct has not been employed in a position (the Current Value Column will be blank), then enter the following in the Job Begin Date Field:	(enter corresponding year)
	Fall Semester: 09/01/20	09/01/20 for Fall Semester
	Shund Sennesrer 05/01/50	02/01/20 for Spring
	Add Employee Job, 004030-00 Adjunct Instructors	Semester
	Job Begin Date: MM/DD/YYYY 02/01/2015	
	Jobs Effective Date: MM/DD/YYYY(Not Enterable) 02/01/2015	
	Personnel Date: MM/DD/YYYY(Not Enterable) 02/01/2015	
	Contract Type: Secondary	
	Annual Salary: * 6000.00	
	FTE: * 25	
	Employee Class Code: *(Not Enterable)	
	Payroll Id; *(Not Enterable) M2	
	Job Change Reason: (Not Enterable)	
	Step: (Not Enterable)	
	Job Status: (Not Enterable)	
Job Effective Date:	Field cannot be changed. Information is defaulted.	
Job Personnel	Field cannot be changed. Information is defaulted.	
Date:	Field is defaulted to primary. If error occurs then change contract type to Secondary	
Title:	Enter title as: Adjunct Instructor in	Adi Instr Social Sci
Annual Salary:	Total amount to be paid for course overloads	3000.00
FTE:	FTE for overload is calculated as follows:	Enter the number
	25 - 1 course overlead $75 - 2$ course overlead	FTE for the number
	.50 = 2 course overload $1.00 = 4$ course overload	of course overloads:
	To figure FTE divide the amount to be paid by $12,000$ Example: $\frac{300}{12,000} = .025$	Example: .25
Contract Type	Field cannot be changed. Information is defaulted.	
Employee Class Code	Field cannot be changed. Information is defaulted.	
Payroll ID	Field cannot be changed. Information is defaulted.	
Leave Rept Pay ID	Field cannot be changed. Information is defaulted.	Match Leave Rept Pay ID to Payroll ID
Job Change Reason	Field cannot be changed. Information is defaulted.	
Step	Field cannot be changed. Information is defaulted.	
Job Status	Field cannot be changed. Information is defaulted.	

Add Employee Job, 000458-00 Adjunct Instr Social Scie

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	09/01/2014	
Jobs Effective Date: MM/DD/YYYY(Not Enterable) 09/01/2014	02/01/2015
Personnel Date: MM/DD/YYYY(Not Enterable)	09/01/2014	02/01/2015
Contract Type:	Primary	Primary 💌
Title: 🜟	Adjunct Instr Social Scie	Adjunct Instr Social Sci
Annual Salary: 🜟	3000	3000.00
FTE: 🔹	.125	.125
Employee Class Code: *(Not Enterable)	F3, Faculty P/T < 9 Months	F3
Payroll Id: *(Not Enterable)	M2	M2
Leave Rept Pay ID: *(Not Enterable)	M2	M2
Job Change Reason: (Not Enterable)	ADJUN	ADJUN
Step: (Not Enterable)	0	0
Job Status: (Not Enterable)	Active	A

9. Update Factors, Pays, and Hours - see table below for instructions

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Update Factors, Pays, and Hours,

Item	Current Value New Value	
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	02/01/2015	
Factor: (Not Enterable)	4	No Action Noodod
Pays: (Not Enterable)	4	No Action Needed
Hours per Pay: (Not Enterable)	84	

10. Terminate Employee Job

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Terminate Employee Job, 004030-00 Adjunct Instructors

Item	Current Value	lew Value	
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)		05/31/2015	No Action Need
Job Status: *(Not Enterable)		Т	NO ACTION NEEDO
Job Change Reason: \star (Not Enterable)		JBEND	

11. Labor Distribution - Update if Needed

- a. The current position's labor distribution information is displayed. The "Labor Distribution in effect as of entered effective date" is the most current effective date for this position number.
- a. In the "NEW" section add new rows or make changes to the existing rows. If no changes are needed, then take no action.
- b. EFFECTIVE DATE: The effective date in most cases is either 09/01/20__ or 02/01/20__.
- c. Apply the appropriate changes to the field if necessary.
- d. Changes to the accounting information will be <u>LIMITED</u>. The correct accounting information should default in the field according to the position number being used.
- e. The fund, organization, account, and program codes will <u>NOT</u> need to be change unless payment is being charged by grant or other funds.

Steps to change Labor Distributions

1. Change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.



Click to "Save and Add New Rows"

Current Effective Date: COA Index Fun 1 10	09/01/2014 Id Organization Account Prog 3001 61200 0101	ram Activity L	ocation Projec	t <mark> Cost Percent E</mark> 100.00	ncumbrance Override	e End Date					
New Effective Date: COA Index Q 1	MM/DD/YYYY 02/01/2015 Fund Organization Q 10 Q 3001	Account Q 61200	Program	Activity	Location Project	Cost	Percent Encumbra	nce Override End D	ate Remove		Enter COA Fund # Org#
Q 1	Q 10 Q 3001 Q 340231 Q 0387	Q 61200	Q 0101	۹			20.00				Account# and Percentage. Be sure percentages = 100%.
a		Q Q Q Q	Q Q Q Q	Q Q Q Q						•	
Default from Ind	lex Save and Add New Rows					Total:	100.00				

- 3. Click on the box under the "Remove" Column to remove the old accounting information. The percentage should be set 0.00%.
- 4. Click on Save and Add New Rows. The old accounting information should be removed.



12. Routing Queue

- In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- o For Adjunct Rehires, all EPAFs must have a Chair and Dean level approval. Other approval levels will default.
- For Grants, <u>all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office</u>. Other approval levels will default.
- For Continuing Education courses, add <u>Dean, Graduate and Continuing Education and Continuing Education (Marilyn</u> <u>Read).</u>

Approval Queue					
Approval Level	U	lser Name		Required Action	Remove
10 - (CHAIR) Chair	~ Q			Approve v	·] 🗆
15 - (DEAN) Dean	~ Q			Approve 🗸	·] 🗆
39 - (ACAFF1) Academic Affairs (Hayley)	~ Q	HMURRELL	Hayley H Murrell	Approve 🗸	· 🗆
40 - (ACDAFF) Academic Affairs	~ Q	CBALLARD	Cheryl M Ballard	Approve v	· 🗆
45 - (PROVOS) Provost of Academic Affairs	~ Q	CMCADAMS	Charles Alan McAdams	Approve v	· 🗆
50 - (HRFYI) HR FYI	~ Q	SMPHILLIPS	Samantha Myers Phillips	FYI v	·] 🗆
65 - (BUDGET) Budget Office	~ Q	BLINDSEY	Beverly Coons Lindsey	Approve 🗸	· 🗆
70 - (PAYROL) Payroll FYI (Monthly)	~ Q	MPHILLIPS	Mary Ruth Phillips	FYI v	· 🗆
75 - (HRDIR) Human Resource Director	~ Q	LGIGER	Lisa Weeks Giger	Approve •	· 🗆
99 - (SUPER) Superuser	~ Q	MPHILLIPS	Mary Ruth Phillips	Apply ~	·] 🗆
Not Selected	~ Q			Not Selected	,
Not Selected	~ Q			Not Selected	,
Not Selected	~ C	Search		Not Selected	,
Not Selected	~ Q			Not Selected	7

Save and Add New Rows

13. Click on the "Save and Add New Rows".

14. Comments

- In the "Comments" section, enter comments for the approvers with an explanation for the action.
- o In the "Comment" section, also enter the following for overload information:
 - CRN #:
 - Credit Hour:
 - Course Number:
 - Course Title:
 - Section:
 - Enrollment:
 - Reason for Overload:

Comment



15. Save EPAF

- Hit the "Save" Button at the bottom of the form.
- Return to the top of the form.
- The message should display "Your change was saved successfully."
- Check your date entry

Electronic Personnel Action Form



16. Submit EPAF

- o Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
- o The EPAF automatically routes to the approvers in the order of their approval levels.

Electronic Personnel Action Form



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Errors and Warning Messages

Туре	Message Type	Description
Add Employee Job	WARNING	*WARNING* This employee is terminated on the Employee Form.
Add Employee Job	WARNING	*WARNING* The Employee's Term Date and Reason should be removed from PEAEMPL.
Add Employee Job	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
Update Factors, Pays and Hours	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.

* - indicates a required field.

Delete

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

How to Process:

Summer School Overload Pay Summer School Overload Pay (Continuing Education) Summer School Overload Pay – Course Taught Over Both Sessions Summer School Overload Pay (Continuing Education) – Course Taught Over Both Sessions

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to process an overload for current faculty/staff employees and adjuncts, which already have an active job for the semester. The steps below should be followed:

- Enter the employee's 900# or click on the \bigcirc magnifying glass to search for an employee's 900#.
- The query date will default to today's date. Change the query date to:
 - a. Summer School Session I: 06/01/2018 or 06/01/20_
 - b. Summer School Session II: 07/01/2018 or 07/01/20___
- Select from the drop down approval category box
 - Summer School Overload Pay
 - Summer School Overload Pay (Continuing Education)
 - Summer School Overload Pay Course Offered Over Both Sessions
 - Summer School Overload Pay Continuing Education Course Offered Over Both Sessions

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DATE YOU WANT THE TRANSACTION TO TAKE PLACE. IF IT IS NOT SET TO THE CORRECT DATE, IT WILL CAUSE AN ERROR AND YOU WILL HAVE TO RESTART THE EPAF.

Enter an ID, select	the link to search for an ID, or generate	e an ID. Enter the Query Date	and select the Approval Category. Sel	lect Go.
* - indicates a required fie	eld.			
ID: • 900127333	Rylee Cassandra Donovan	å 0		After identifying an employee, clic
Ouery Date: MM/D	D/YY (Y) 05/01/2015			Approval Category drop down m
Approval Category:	Summer School Overload, DO	00040	✓ ←	to select the EPAF for Summer
Go				School Overload Pay and/or Sur
				Education – Non Credit)
Employee Job Assig	nments			
Type Position Suffix	Title Time She	eet Organization Start Date	End Date Last Paid Date Status	
All lobs	Dir Field Experiences & Profes/0507, Te	achei Euucacion (Sep 01, 201	Active	
				The Employee Job Assignments show al
				active positions. By clicking the All Jobs
				button, it will display all current and prev
				Color.

• Enter the correct position numbers in the format indicated below and click on "GO". If a position number has already been assigned to the employee, select the radial dial at the end of the line and click on "GO". It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.

Position #:	Suffix #:	Description
000468	00	Overloads paid for credit hour courses.
004025	00	Overloads paid by other funds (not grants). The fund #s usually start with 108.
004030	00	Overloads paid by grant funding. The fund #s usually start with 3.
000478	00	Overloads paid by Continuing Education. The section numbers will start with a "c".
		Example: Section c21

New EPAF Job Selection

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



Ove	rload/Add	Job, C00006								
Sear	rch Type 🦯	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Sele
Q	New lob	000468	00	Summer School	1701, Summer School					۲
	Primary	000201	00	Dir Field Experiences & Profes	0507, Teacher Education	Sep 01, 2013			Active	0
All . Nex	Jobs	ype Go								

- View Employee Class:
 - a. This section allows the originator to view the current employee's employment information.
 - b. Employment Status must equal (A) Active.
 - c. If employment status is listed something else other than Active, do not use this EPAF.
 - d. These fields are not able to be changed.

* - indicates a required field.

View Employee Employment Class

Item	Current Value	New Valu
Employee Class Code: (Not Enterable)	F1, Faculty 9/12	
Employee Status: *(Not Enterable)	Active	A
• Enter Overload Pay Information

Field	Statement/A	Action	Action/Example
Job Begin Date:	If the "Current Value" column is populated, then	>	Leave "Job Begin Date"
Ū			field blank
	Overload/Add Job. 000468-00 Summer School ii CSI	P686, Last Paid Date: Jun 26, 2014	
	Item Current Value	e New Value	
	Job Begin Date: MM/DD/YYYY 05/01/1993		
	Jobs Effective Date: MM/DD/YYYYY (Not Enterable) 07/30/2014	06/01/2015	
	Contract Tupo: (Net Enterable)	05/26/2015	
	Title: Summer Seb		
	Annual Salany: 2000		
	Annual Salary. * 3000		
	FTL: * .20 Employee Class Code: . (Not Enterable) E1. Eaculty 9	/12	
	Payroll Id: (Not Enterable)		
	Leave Rent Pay ID: . (Not Enterable)	50	
	Job Change Reason: (Not Enterable)	OVER	
	Sten: (Not Enterable) 0		
	Job Status: (Not Enterable)		
	If the "Current Value" field is not populated then		Enter:
			(enter corresponding
	Overland (Add Job 000468 00 Summer Cab-		dates)
	Overload/Add Job, 000468-00 Summer Scho	81	,
	Item Current	Value New Value	06/01/2018 or
	Job Begin Date: MM/DD/YYYY		06/01/20 Summer
	Dobs Effective Date: MM/DD/YYYY(Not Enterable)	06/01/2016	SCHOOLI
	Contract Type:	Overload ×	07/01/2018 or
	Title: *		07/01/20 - for
	Annual Salary: *	·	Summer School II
	FTE: *		
	Employee Class Code: * (Not Enterable)	F3	
	Payroll Id: *(Not Enterable)	su	
	Time Entry Type:	Not Selected v	
	Leave Rept Pay ID: *(Not Enterable)	Not Selected Y	
	lob Change Reason: (Not Enterable)	OVER	
	Step: (Not Enterable)	0	
	Job Status: (Not Enterable)	A	
Joh Effective	Field connet be changed information is defaulted		
Job Effective	Field cannot be changed. Information is defaulted.		
Job Personnel	Field cannot be changed. Information is defaulted.		
Date:	5		
Title:	Enter the course information for the overload that is bei	ng paid.	Example:
			Summer School ART
			OR
			UN UN
			SSI ART 101/ART 103
Annual Salary	Total amount to be paid for course overloads		3000.00
FTE:	FTE for overload is calculated as follows:		Enter the number FTE
	25 = 1 course overload 75 = 2 course	overload	for the number of
	50 = 2 course overload $100 = 4$ course	overload	course overloads:
			Example: .25
Contract Type	Field cannot be changed. Information is defaulted.		
Employee Class	Field cannot be changed. Information is defaulted.		
Code			

Payroll ID	Payroll ID will default to SU . Field can be change.	Payroll ID SU should remain defaulted.
Leave Rept Pay ID	The Leave Report Pay ID should match the Payroll ID above.	Match Leave Rept Pay ID to Payroll ID SU
Job Change Reason	Field cannot be changed. Information is defaulted.	
Step	Field cannot be changed. Information is defaulted.	
Job Status	Field cannot be changed. Information is defaulted.	

Overload/Add Job, 000468-00 Summer School

Item	Current Value New Value
Job Begin Date: MM/DD/YYYY	
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	06/01/2016
Personnel Date: MM/DD/YYYY(Not Enterable)	05/31/2016
Contract Type:	Overload 🗸
Title: *	Summer School ART 101
Annual Salary: \star	3000.00
FTE: *	.25
Employee Class Code: *(Not Enterable)	F3
Payroll Id: *(Not Enterable)	su
Leave Rept Pay ID: *(Not Enterable)	SU
Job Change Reason: (Not Enterable)	OVER
Step: (Not Enterable)	0
Job Status: (Not Enterable)	A

• Update Factor, Pays, and Hours

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Update Factors, Pays and Hours, 000468-00 Summer School



• Terminate Employee Job

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

item	Current Value New Value	
lobs Effective Date: MM/DD/YYYY*(Not Enterable	06/29/2016	No. Action Noodod
lob Status: *(Not Enterable)	т	NO ACTION NEEDED
lob Change Reason: * (Not Enterable)	JBEND	

- Update Default Earnings
 - a. In the "CURRENT" section If there is not a date entered under the effective date, then a new effective date will need to be entered under the "NEW VALUE" section.

If a current date is not listed under the "CURRENT" effective date, then enter 06/01/2017 for	Update Default Earnings, 000468-00 Summe Current Effective Date[Far.mgs Hours or Units Per Pay]Deer	er School med Hours Special Rate Shift End Date	
Summer School I or 07/01/2017	Effective Date MM DD/YYYYEarnings Not Selected	Hours or Units Per Pay/Deemed Hours/Special Rate	Shift End Date MM/DD/YYYY Remove
"NEW VALUE EFFECTIVE	Not Selected	v	
DATE" field.	Not Selected	v	1
	Not Selected	v	1

- b. Enter 06/01/2018 for Summer School I or 07/01/2018 for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.
- c. Select SUM, Summer Pay as the Earnings Code using the drop down box.
- d. Enter **84.00** as the Hours or Units Per Pay.

Update Default Earnings, 000468-00 Summer School

Current Effective DateEarningsHours or Units Per PayDeemed HoursSpecial RateShiftEnd Date

New Value			
Effective Date MM/DD/YYYY	/Earnings	Hours or Units Per Pay Deemed Hours Special Rate	Shift End Date MM/DD/YYYY Remove
06/01/2016	SUM, Summer Pay v	84.00	1
	Not Selected ~		
	Not Selected v		
	Not Selected		

Lindate Default Fa	U0/U1/2U10 0[U1/U1/2U	18 dependi	ng on the summe st Baid Date: Jul 30, 2013	er session.			
Current	annings, 000400-00 Summer Schoo	of it instructor, La	st Palu Date. Jul 30, 2013	3			
Effective Date Earni	ngs Hours or Units Per Pay I	Deemed Hours Spe	cial Rate Shift End Date				
00/01/2010 00/01	84.00						
New Value							
Effective Date MM/D	DD/YYYY Earnings	Hou	rs or Units Per Pay Deemed	Hours Special Rate	Shift End Date MM/DD/Y	YYY Remove	
06/01/2013	SUM, Summer Pay	•	84.00				
	Net Celested		1	1	,		
	Not Selected	•				Enter 06/01/2018	or 07/01/2018
	Not Selected	•				the new effective	date.
1					1		
	Not Selected	•					
					1		
	Net Oslastad	-					

- Labor Distribution Update if Needed
 - a. In the "CURRENT" section the current labor codes and the effective date of the last change will default into the form.
 - b. In the "NEW" section add new rows or make changes to the existing rows.
 - c. Changes to the accounting information will be <u>LIMITED</u>. The correct accounting information should default in the field according to the position number being used.
 - d. The fund, organization, account, and program codes will <u>NOT</u> need to be change unless payment is being charged by grant or other funds.
 - e. EFFECTIVE DATE: The effective date should equal either: 06/01/2017 or 07/01/2017 depending on the summer school session.
 - f. Apply the appropriate changes to the field if necessary.

MAKE SURE THE DATE IN THE "EFFECTIVE DATE" FIELD IS 06/01/2018 OR 07/01/2018 DEPENDING ON THE SUMMER SCHOOL SESSION. IF NOT, THE EPAF WILL CONTAIN AN ERROR.

Update Labor Distributions, 000468-00 Summer School Current Effective Date: 06/01/2016 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date								te	Make s 'EFFEC	ure the date lis CTIVE DATE" er School I: 06	sted in the field is: 6/01/2018
New Effective Date: N	1M/DD/YYYY	06/01/2016	<					- (Summe	er School II: 0	7/01/2018
COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance (Override End Date
Q 1	0 10	Q 1701	61200	0103	9				100.00		
۹ 🗌		Q	Q.	Q	_ Q						
۹ 🗌	_ Q		<u>م</u>	_ Q	_ <						
۹ <u> </u>		Q			_ Q [1	
		Q	- Q.		_ Q [
								Total:	100.00)	
ø									_		
Default from Index	Save and Ad	d New Rows									

Steps to change Labor Distributions

1. Change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.

rent rective Date: 06/01/2 Molecular Fund Index Fund Index Fund I Q I A Index Fund I Q I C Q	016 ation Account Prog VYYY 06/01/2016 Q 1701 Q 1701 Q 0 Q 0 Q 0 Q 0 Q 0 Q 0 Q 0 Q 0	ram Activity Lo	cation Project	Cost Percent En	Location	rride End Date	Cost Percent Encu	I: 06/01/2018 II: 07/01/2018 Umbrance Override End Date Change this percentage to 0.00 and click on Save and Add New Rows.
w fective Date: MM/DD/ DA Index Fund [] [] [] <	VVVV 06/01/2016 Organiza Q Q 1701 Q 1701 Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Itions, 000468-0 D16 Organiza Q 1701 Q Q Q Q	ation Account	Program Q 0103 Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q	Activity Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q	Location Location Location Location Location	Project	Summer School Summer School Cost Percent Enci Total: 100.00	I: 06/01/2018 II: 07/01/2018 umbrance Override End Date Change this percentage to 0.00 and click on Save and Add New Rows.
Index Func 1 Index 1 Index 1 Index 1 Index 1 Index Index Index Index Index Index Index Index Save a Ddate Labor Distribution Save a Index Fund Index Index	VYV 06/01/2016 Organiza Q Q 1701 Q Q	Account Q 61200 Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q	Program Q 0103 Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q	Activity Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q	Location Location Location Location	Project C	Cost Percent Encu Total: 100.00 Total: 100.00 Cost Percent Encu	umbrance Override End Date Change this percentage to 0.00 and click on Save and Add New Rows.
I Q IO I Q Q I Q Q I Q Q I Q Q Index Fund Organization W Index Fund I Q IO I Q Q I Q Q I Q Q I Q Q I Q Q I Q Q I Q Q I Q Q	Q 1701 Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q Q	A 61200 A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A	Cation Project (Cost Percent En	cumbrance Over	ride End Date	100.00 Image: Cost Percent 0.00 Image: Cost	Change this percentage to 0.00 and click on Save and Add New Rows.
wefault from Index Save a bdate Labor Distribution Save a ctive Date: 06/01/20 w Gettive Date: M Index Fund Index I Index I Index Q Index Q Index I Q I Q I Q I Q I Q I Q I Q I Q	A A A A A A A A A A B A B <td< td=""><td>00 Summer S</td><td>School</td><td>Cost Percent En</td><td>cumbrance Over</td><td>ride End Date</td><td>Total: 100.00</td><td>Change this percentage to 0.00 and click on Save and Add New Rows.</td></td<>	00 Summer S	School	Cost Percent En	cumbrance Over	ride End Date	Total: 100.00	Change this percentage to 0.00 and click on Save and Add New Rows.
vefault from Index Save a odate Labor Distribution Save a odate Labor Distribution Save a odate Labor Distribution Save a rrent Save a fective Date: 06/01/20 A Index Fund 1 Save a 0 Save a 0 Save a	A Add New Rows ations, 000468-0 b16 b10 CVVV 06/01/2016 CVVV 06/01/2016 CVVV	00 Summer S	School	Cost Percent En	cumbrance Over	ride End Date	Total: 100.00	to 0.00 and click on Save and Add New Rows.
befault from Index Save a codate Labor Distribution Save a rrent 6(01/2) fective Date: 06/01/2) Save a w Save a codate Labor Date: MM/DD/ A Index Fund 10 Code Code Code Code Code Code Code Code	nd Add New Rows Itions, 000468-(D16 Ation Account Prog VYYY [06/01/2016 Corganiza Q [1701 Q] Q] Q] Q] Q] Q] Q] Q]	00 Summer S	cation Project(Cost Percent En	Location	ride End Date	Total: 100.00 Cost Percent Encu 0.00	and Add New Rows.
A Index Fund 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	nd Add New Rows	oo Summer S	cation Project(Program Q 0103 Q 0103 Q 0 Q 0 Q 0 Q 0 Q 0 Q 0 Q 0 Q 0	Cost Percent En	cumbrance Over	ride End Date	Cost Percent Encu	Imbrance Override End Date
A Index Fund 1 0 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Itions, 000468-0 Itions, 000468-0 D16 Organiza Q [701 Q [Q] Q] Q] Q] Q] Q] Q] Q]	00 Summer S	cation Project(Program Q 0103 Q 01	Cost Percent En	Location	ride End Date	Cost Percent Encu 0.00	umbrance Override End Date
Didate Labor Distribution rrent fective Date: 06/01/20 A Index Fund Organization M Index Fund 1 A Index Q 10 A Index Q 10	utions, 000468-0 016 ation Account Progr VVVV 06/01/2016 0rganiza Q 1701 Q 1701 Q 2 Q 2 Q 2 Q 2 Q 2 Q 2 Q 2 Q 2	ation Account	cation Project(Program Q 0103 Q 0103 Q 0 Q 0 Q 0 Q 0 Q 0 Q 0 Q 0 Q 0	Cost Percent En	cumbrance Over	ride End Date	Cost Percent Encu 0.00	Imbrance Override End Date
bdate Labor Distribution	11ions, 000468-0 11ion Account Prog 006/01/2016 000000000 000000000000000000000000	ram Activity Lo	Cation Project(Program Q 0103 Q _ Q _ Q _ Q _ Q _ Q _ Q _	Cost Percent En	Location	ride End Date	Cost Percent Encu 0.00	umbrance Override End Date
irrent fective Date: 06/01/2 A Index Fund Organiz w fective Date: MM/DD/ A Index Fund 1Q 10 Q 10 Q 2 Q 2 	016 ation Account Progr VVVV 06/01/2016 Organiza Q 1701 Q 2 Q 2 Q 2 Q 2 Q 2 Q 2 Q 2 Q 2 Q 2 Q 2	ram Activity Lo	Project Q 0103 Q 0 Q 0 Q 0 Q 0 Q 0	Cost Percent En	cumbrance Over	ride End Date	Cost Percent Encu 0.00	Imbrance Override End Date
DA Index Fund Organiz w fective Date: MM/DD/ DA Index Fund 1 0 0 10 0	Account Prog (YYY 06/01/2016 0rganiza Q 1701 Q Q Q Q Q Q	tion Account	Project Q 0103 Q 0 Q 0 Q 0 Q 0 Q 0	Activity	Location	ride End Date	Cost Percent Encu	umbrance Override End Date
W Fective Date: MM/DD/ A Index Fund I Q Io I Q Q I Q Q I Q Q I Q Q I Q Q I Q Q	Organiza Qrganiza Q Q Q Q Q Q Q Q Q	Account Q 61200 Q	Program Q 0103 Q	Activity	Location	Project (Cost Percent Encu	Imbrance Override End Date
DA Index Fund 1 Q 10 1 Q 10 1 Q Q 1 Q Q 1 Q Q 1 Q Q 1 Q Q 1 Q Q 1 Q Q	Organiza Q 1701 Q Q Q Q Q Q	Account Q 61200 Q Q Q Q	Program Q 0103 Q 2 Q 2 Q 2 Q 2 Q 2 Q 2 Q 2 Q 2	Activity	Location	Project C	Cost Percent Encu	Imbrance Override End Date
	۵ ۵ ۵							
<u>م</u>	Q	Q	Q					
			,	4			I I	
							Total: 100.00	
 Enter the new f. CO g. Fur h. Org i. Acc j. Per 	A = enter 1. A = enter 1. No No. Janization No. Sount No. = 612 Centage = total	formation. 1 200 Is must equa	ne tollowing al 100%. Se	e sample be	itered for eac	n line.		
to "Save and Add date Labor Distribut	New Rows"	Summer Scho	ol					
rrent ective Date: 06/01/201	6							
A Index Fund Organizati	on Account Program	ActivityLocatio	on Project Cost P	ercent Encumbra	ance Override En	d Date		
w ective Date: MM/DD/YY	YY 06/01/2016							
A Index Fund	Organization	Account	Program	Activity La	ocation Projec	t Cost P	Percent Encumbrance C	Override End Date
	Q 1701	Q 61200	C (0103				25.00	Enter COA, Fund #,
1 Q 3402: Q	4155 Q	Q 61200					75.00	Org#, and Account#
	Q	٩,	۹ 🗌					and percentage.
						Total:	100.00	
efault from Index Save and	Add New Rows							

- 6. Click on the box under the "Remove" Column to remove the old accounting information. The percentage should be set 0.00%.
- 7. Click on Save and Add New Rows. The old accounting information should be removed.

Update Labo	r Distributions	s, 000468-00) Summer Sc	hool									
Current													
Effective Date:	06/01/2016												
COA Index Fun	d Organization A	Account Progra	m Activity Loca	ation Project Co	ost Percent End	cumbrance Ove	rride End Da	te					
New													
Effective Date:	MM/DD/YYYY	06/01/2016											
COA Index	Fund	Organizati	on Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance (Override End Dat	te Remove	
Q 1	Q 10	Q 1701	Q 61200	Q 0103	۹.				.00				
											_		Click the remove
4 1	10	1701	61200	0103	4				25.00				
Q	0 240221	9 4155	9 (1300	9 0000					75.00		-		button on the line
	\$ 340231	4155	61200	4 0609					/5.00				that has 0 000/
۹			٩		Q						-		that has 0.00%
		- a	_ \		_		-				-		entered. Then click
			_ Q		_ <		- i		-i	· · · · · · · · · · · · · · · · · · ·	-		
۹ 🗌	<u>م</u>	_ Q	<u>م</u>	_ Q	- Q				-				on "Save and Add
								Total:	100.00				New Peuro
									100.00				New Rows.
Default from Inde	Save and Add	New Rows	\leftarrow										

8. Routing Queue

- a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- b. For Overloads, all EPAFs must have a Chair and Dean level approval.
- c. For Grants, <u>all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office</u>. Other approval levels will default.
- d. For Continuing Education courses, add <u>Dean, Graduate and Continuing Education and Continuing Education (Marilyn</u> <u>Read).</u>

Approval Queue					
Approval Level		User Name		Required Action	Remov
10 - (CHAIR) Chair	~	۹ [Approve ~	. 🗆
15 - (DEAN) Dean	~	۹		Approve v	-] 🗆
39 - (ACAFF1) Academic Affairs (Hayley)	~	G HMURRELL	Hayley H Murrell	Approve v	·] 🗆
40 - (ACDAFF) Academic Affairs	~	CBALLARD	Cheryl M Ballard	Approve v	·] 🗆
45 - (PROVOS) Provost of Academic Affairs	~	CMCADAMS	Charles Alan McAdams	Approve v	
50 - (HRFYI) HR FYI	~	SMPHILLIPS	Samantha Myers Phillips	FYI v	·] 🗆
65 - (BUDGET) Budget Office	~	Q BLINDSEY	Beverly Coons Lindsey	Approve v	
70 - (PAYROL) Payroll FYI (Monthly)	~	MPHILLIPS	Mary Ruth Phillips	FYI v	· 🗆
75 - (HRDIR) Human Resource Director	~	Q LGIGER	Lisa Weeks Giger	Approve v	0
99 - (SUPER) Superuser	~	MPHILLIPS	Mary Ruth Phillips	Apply ~	· 🗆
Not Selected	~	۹		Not Selected	-
Not Selected	~	۹		Not Selected	'
Not Selected	¥	© Search		Not Selected	•
Not Selected	~	۹ 🛛		Not Selected v	·]

Save and Add New Rows

9. Click on the "Save and Add New Rows".

10. Comments

- a. In the "Comments" section, enter comments for the approvers with an explanation for the action.
- b. In the "Comment" section, also enter the following for overload information separated as shown below:
 - i. CRN #:
 - ii. Credit Hour:
 - iii. Course Number:
 - iv. Course Title:
 - v. Section:
 - vi. Enrollment:
 - vii. Reason for Overload: Summer Pay for Full Time Faculty

Comment



Enter additional information here.

Enter: CRN #: | Credit Hour: | Course #: | Course Title | Section: | Enrollment: | Reason for Pay: Summer Pay for Full time faculty/ and whether the course is offered through Continuing Education.

11. Save EPAF

- a. Hit the "Save" Button at the bottom of the form.
- b. Return to the top of the form.
- c. The message should display "Your change was saved successfully."
- d. Check your date entry

Electronic Personnel Action Form

Your change was saved successfully.

Penter the information for the EPAP and either Save or Submit



- Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit. a.
- The EPAF automatically routes to the approvers in the order of their approval levels. b.

Electronic Personnel Action Form

The transaction has been successfully submitted. Enter the information for the EPAF and either Save or Submit Rylee Cassandra Donovan, 900127333 ame and ID: 1636 Query Date: Jun 01, 2016 ransaction: ransaction Status: Pending proval Category: Summer School Overload, D00040

Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Errors and Warning Messages

Туре	Message Type	Description
Add Employee Job	WARNING	*WARNING* This employee is terminated on the Employee Form.
Add Employee Job	WARNING	*WARNING* The Employee's Term Date and Reason should be removed from PEAEMPL.
Add Employee Job	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
Update Factors, Pays and Hours	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
indicates a required field		

🛊 - indicates a required field.

Delete

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

How to Process:

Summer School Adjunct Re-Appointment

Summer School Adjunct Re-Appointment (Continuing Education) Summer School Adjunct Re-Appointment – Course Taught Over Both Sessions Summer School Adjunct Re-Appointment – (Continuing Education) - Course Taught Over Both Sessions

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to rehire an adjunct. The steps below should be followed:

- 1. Enter the employee's 900# or click on the \bigcirc magnifying glass to search for an employee's 900#.
- 2. The query date will default to today's date. Change the query date to:
 - a. Summer School I: 06/01/2018
 - b. Summer School II: 07/01/2018
- 3. Select from the drop down approval category box:
 - Summer School Adjunct Re-Appointment
 - Summer School Adjunct Re-Appointment (Continuing Education)
 - Summer School Adjunct Re-Appointment (Course Taught Over Both Sessions)
 - Summer School Adjunct Re-Appointment Continuing Education (Course Taught Over Both Sessions

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.

ID: •	900127334	4 Olivia Caden	Silver			å 0				After identifying an employee, click the Approval Category drop down menu to select
Quer Appro Go	y Date: M oval Cate	gory: • Sumn	ner School	Adjunct	t Rehire, D	00042			v K	the Summer School EPAF for Adjunct Rehire and/or Adjunct Rehire (Continuing Education – Non Credit).
Employee Type	Job Assignn Position Suffi	nents x Title	Time Sheet C	rganizatior	N Start Date	End Date	Last Paid Date	Status	1	,
Primary	000377 00	Human Resources Assistant	4113, Human	Resource	Jan 01, 2014			Active		
Secondary	000458 00	Square dance instructor	0387, Social	Science	Sep 01, 2014	May 31, 2015		Terminated	8	
Secondary	000478 00	Adjunct Instr Teach Ed	0387, Social	Science	Feb 01, 2015	May 31, 2015		Terminated	8	
Active Jo	bs 🧲			EPAF App	prover Summary	EPAF Original	tor Summary	Ta	The Employee Job Ass active positions. By clic	ignments show all cking the All Jobs

- 4. Click on "Go" to begin the Summer School EPAFs for Adjunct Rehire and/or Adjunct Rehire (Continuing Education Non Credit).
- 5. Click on the button "All Jobs".
- 6. Select the position in which to reactivate by clicking on the radial dial at the end of the row. The position to reactivate will usually be position 000468 for credit courses and 000478 for Continuing Education Non Credit courses.
- 7. If the employee does not have a job with the correct position number, then enter the position number in the format indicated below and click on "GO". It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.

jobs.

Position #:	Suffix #:	Description
000468	00	Overloads paid for credit hour courses.
004025	00	Overloads paid by other funds (not grants). The fund #s usually start with 108.
004030	00	Overloads paid by grant funding. The fund #s usually start with 3.
000478	00	Overloads paid by Continuing Education. The section numbers will start with a "c".
		Example: Section c21

Overlo	ad/Add J	ob, C00006								
Search	Туре	Desition	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	NewJob	000468	00	Summer School	1701, Summer School					۲
	Primary	000003	00	Assistant Professor of Art	0507, Teacher Education	Aug 15, 2013			Active	0
All Jo Next	bs Approval T	ype Go								

Enter Adjunct Employment Record – See table below for instructions.

Field	Statement/Action	Action/Example
Home Organization	Home Organization Change if needed. A change is usually not needed	
Distribution Org	Change if needed. If Home organization is change, then distribution	
	org must match home org.	
Current Hire Date	Field cannot be changed. Information is defaulted.	No action needed
Employee Status Field cannot be changed. Information is defaulted.		No action needed
Employee Class Code Enter the following if needed: (Usually a change is not needed)		
	F3=adjunct employee	F3 or RT
	RT=reemployment of PERS retiree	
Home COAS	Field cannot be changed. Information is defaulted.	No action needed
Term Reason Code:	Field cannot be changed. Information is defaulted.	No action needed
Terminate Date:	Terminate Date: Field cannot be changed. Information is defaulted.	
Last Work Date:	Field cannot be changed. Information is defaulted.	No action needed

An * is a required field.

Item	Current Value	New Value
Home Organization:	0377, Music	٩,
Distribution Orgn:	0377, Music	٩,
Current Hire Date: MM/DD/YYYY(Not Enterable	e) 01/01/2016	
Employee Status: *(Not Enterable)	Active	A
Employee Class Code:	F3, Faculty P/T < 9 Months	; Q
Home COAS: *(Not Enterable)	1	1
Term Reason Code: (Not Enterable)		JE
Termination Date: MM/DD/YYYY(Not Enterable)	06/29/2016
Last Work Date: MM/DD/YYYY(Not Enterable)		06/29/2016

• Enter Overload Pay Information

Field	St	tatement/Action		Action/Example
Job Begin Date:	If the "Current Value" column is populated	l, then	>	Leave "Job Begin Date" field blank
	Overload/Add Job, 000468-00 Summer	School ii CSP686, Last	Paid Date: Jun 26, 2014	
	lie ee		New Webus	
	Job Begin Date: MM/DD/YYYY	05/01/1993	New Value	
	Jobs Effective Date: MM/DD/YYYY(Not Enterab	e) 07/30/2014	06/01/2015	
	Personnel Date: MM/DD/YYYY(Not Enterable)	07/30/2014	05/26/2015	
	Contract Type: (Not Enterable)	Overload	0	
	Title: 🛓	Summer School ii CSP686	3	
	Annual Salary: 🖌	3000		
	FTE: *	.25		
	Employee Class Code: *(Not Enterable)	F1, Faculty 9/12	F3	
	Payroll Id: *(Not Enterable)	SU	SU	
	Leave Rept Pay ID: *(Not Enterable)	SU	SU	
	Job Change Reason: (Not Enterable)	JBEND	OVER	
	Step: (Not Enterable)	0	D	
	Job Status: (Not Enterable)	Terminated	A	
	If the "Current Value" field is not populate	d, then,		Enter:
		-,,		(enter corresponding
	Add Employee Job, 000468-00 S	Summer School		dates)
	Item	Current Value Vew	v Value	06/01/2018 - Summer
	Job Begin Date: MM/DD/YYYY		\leftarrow	School I
	Jobs Effective Date: MM/DD/YYYY(Not En	teratile)	/01/2016	07/04/0040
	Personnel Date: MM/DD/YYYY(Not Entera	ble)	/31/2016	07/01/2018 - TOP Summer School II
	Contract Type:	Se	condary v	
	Title: *			
	Annual Salary: *			
	FTE: *			
	Employee Class Code: *(Not Enterable)	F3		
	Payroll Id: * (Not Enterable)	SU		
	Leave Rept Pay ID: *(Not Enterable)	SU		
	Job Change Reason: (Not Enterable)	AD.	JUN	
	Step: (Not Enterable)	0		
	Job Status: (Not Enterable)	A		
Job Effective Date:	Field cannot be changed. Information is d	lefaulted.		
Job Personnel Date:	Field cannot be changed. Information is d	lefaulted.		
Title:	Enter the course information for the overla	oad that is being paid.		Example:
				Adjunct Instr in Art
Annual Salary:	Total amount to be paid for course overlo	ads		3000.00
FTE:	FTE for overload is calculated as follows:			Enter the number FTE
	.25 = 1 course overload	75 = 3 course overload		course overloads:
	.50 = 2 course overload 1.0	0 = 4 course overload		
				Example: .25

Contract Type	Field cannot be changed. Information is defaulted.	
Employee Class Code	Field cannot be changed. Information is defaulted.	
Payroll ID	Payroll ID will default to SU . Field can be change.	Payroll ID SU should remain defaulted.
Leave Rept Pay ID	The Leave Report Pay ID should match the Payroll ID above.	Match Leave Rept Pay ID to Payroll ID SU
Job Change Reason	Field cannot be changed. Information is defaulted.	
Step	Field cannot be changed. Information is defaulted.	
Job Status	Field cannot be changed. Information is defaulted.	

• Update Factor, Pays, and Hours

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Update Factors, Pays and Hours, 000468-00 Summer School

Item	Current Value New Value	
Factor: *(Not Enterable)	1	
Pays: * (Not Enterable)	1	No Action Needed
Hours per Pay: * (Not Enterable)	84	
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)	06/01/2016	

• Terminate Employee Job

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Terminate Job Only, 000468-00 Summer School

Item	Current Value New Value	
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)	06/29/2016	
Job Status: *(Not Enterable)	Т	No Action Needed
Job Change Reason: * (Not Enterable)	JBEND	

• Update Default Earnings

a. In the "CURRENT" section – If there is not a date entered under the effective date, then a new effective date will need to be entered under the "NEW VALUE" section.

If a current date is not listed under the "CURRENT" effective date, then enter 06/01/2017 for	Opdate Default, Earnings, 000468-00 Summer : Current Effective DateEarnings Hours or Units Per Pay/Deemer New Value	School d Hours <mark> Special Rate</mark> Shift End Date	
Summer School I or	Effective Date MM/I D/YYYY Earnings	Hours or Units Per Pay Deemed Hours Special Rate	Shift End Date MM/DD/YYYY Remove
07/01/2017 for Summer	Not Selected	· · · · · · · · · · · · · · · · · · ·	
School II in the "NEW	Not Selected	· · · · · · · · · · · · · · · · · · ·	
VALUE EFFECTIVE DATE"	Not Selected	~	1
	Not Selected	~	

- b. Enter 06/01/2018 for Summer School I or 07/01/2018 for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.
- c. Select SUM, Summer Pay as the Earnings Code using the drop down box.
- d. Enter **84.00** as the Hours or Units Per Pay.

Update Default Earnings, 000468-00 Summer School

Current							
Effective Date	Earnings Hour	s or Units Per Pay Deemed H	ours Special	Rate Shift End Date			
New Value							
Effective Date	MM/DD/YYYY	Earnings	1	lours or Units Per Pay	Deemed Hours Special Rate	Shift End Date M	M/DD/YYYY Remov
06/01/2016		SUM, Summer Pay	~	84.00			
		Not Selected	~			1	
		Not Selected	~			1	
		Not Selected	~			1	

If the fields are populated under the "CURRENT EFFECTIVE DATE" as shown below, then under the "NEW VALUE EFFECTIVE DATE", enter 06/01/2018 or 07/01/2018 depending on the summer session.

Effective Date Earnings	Hours or Units Per Pay Deeme	d Hours Special	Rate Shift End Date		
06/01/2013 SUM, Sumi	ner Pay 84.00		1		
New Velue					
Effective Date MM/DD/YY	∩ Earnings	Hours of	Units Per Pay Deemed Hours Special Rate	Shift End Date MM/DD/YYYY	Remove
06/01/2013	SUM, Summer Pay	•	84.00		
	Not Selected	•			Enter 06/01/2018 or 07/01/201
	NHOLEI		, , ,		the new effective date.
	Not Selected	•			
	Not Selected	•			
1					
	Not Selected	•			
	Not Selected	•			

- Labor Distribution Update if Needed
 - a. In the "CURRENT" section the current labor codes and the effective date of the last change will default into the form.
 - b. In the "NEW" section add new rows or make changes to the existing rows.
 - c. Changes to the accounting information will be <u>LIMITED</u>. The correct accounting information should default in the field according to the position number being used.
 - d. The fund, organization, account, and program codes will <u>NOT</u> need to be change unless payment is being charged by grant or other funds.
 - e. EFFECTIVE DATE: The effective date should equal either: 06/01/2018 or 07/01/2018 depending on the summer school session.
 - f. Apply the appropriate changes to the field if necessary.

MAKE SURE THE DATE IN THE "EFFECTIVE DATE" FIELD IS 06/01/2018 OR 07/01/2018 DEPENDING ON THE SUMMER SCHOOL SESSION. IF NOT, THE EPAF WILL CONTAIN AN ERROR.

Update Labor Current Effective Date: (COA Index Fund	Distribution 06/01/2016 Organization	ns, 000468-00 Account Progra) Summer Sc mActivityLoca	hool ition Project Co	st Percent Enc	umbrance Ove	rride End Da	te	Mak 'EFF Sum Sum	e sure the da ECTIVE DA mer School mer School	ate listed in the TE" field is: I: 06/01/2018 II: 07/01/2018	
New Effective Date: M	4M/DD/YYYY	06/01/2016	on Account	Program	Activity	Location	Project	Cost	Percept	Encumbrance	Override End Date	
	Q 10	Q 1701	Q 61200	Q 0103	9				100.00			
۹ <u>ــــــــــــــــــــــــــــــــــــ</u>	- Q	Q	_ Q _					_				
٩ 🗌	Q		Q.	۹.		_			_			
۹ <u>ــــــــــــــــــــــــــــــــــــ</u>	- Q		_ Q	_ <		_			_			
9	_ <	Q		_ Q				- i				
, ,	,			,	,			Total:	100.00)		
ø												
Default from Index	Save and Ad	d New Rows										

Steps to change Labor Distributions

2. Change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.

Update Labo Current Effective Date COA Index Fu New	or Distributio :: 06/01/2016 nd Organization	ns, 000468-0 nAccount Progr	00 Summer So amActivityLoc	chool ation Project Co	ost Percent Enc	umbrance Ove	erride End Da	te S	The effective date w oday's date. This n ollowing: Summer School I: (Spring Semester: 0	rill default to the query date or eeds to be change to the 06/01/2018 17/01/2018
COA Index	Fund	Organizat	tion Account	Program	Activity	Location	Project	Cost	Percent Encumbrance	e Override End Date
	Q 10	Q 1701	Q [61200	Q 0103		_		_	100.00	_
	Q	Q					_	_		Ohan wa thia
	Q	Q					- [
	<u>م</u>	Q	م							percentage to 0.00
~								Total:	100.00	and click on Save and Add New Rows.
Default from In	dex Save and A	dd New Rows	←							_

- **13.** Enter the new accounting information. The following must be entered for each line.
 - a. COA = enter 1.
 - b. Fund No.
 - c. Organization No.
 - d. Account No. = 61200
 - e. Percentage = totals must equal 100%. See sample below

Click to "Save and Add New Rows"

Update Labor Distributions, 000468-00 Summer School

Effective Date: 06/01/2016 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date New Effective Date: MM/DD/YVYY 06/01/2016 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date	
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date New Effective Date: MM/DD/YYYY 05/01/2016 COA Index Program Activity Location Program Activity Location Program Activity Location Project Cost Percent Encumbrance Override End Date	
New Effective Date: MM/DD/YYYY 06/01/2016 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date	
Effective Date: MM/DD/YYYY 06/01/2016 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date	
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date	
Q 1 Q 10 Q 1701 Q 61200 Q 25.00 Enter CC	DA. Fund #.
	a Account#
a and percent and a second sec	entage.
Total: 100.00 Page auro	
De Suie	
percenta	aes =
Default from Index Save and Add New Rows	J • •

14. Click on the box under the "Remove" Column to remove the old accounting information. The percentage should be set 0.00%.

15. Click on Save and Add New Rows. The old accounting information should be removed.

Current Effective Date: COA Index Fund	06/01/2016 Organization/	Account Program	n Activity Loca	ation Project Co	stPercentEnd	cumbrance Ove	erride End Da	ite			
lew ffective Date:	MM/DD/YYYY	06/01/2016									
OA Index	Fund Q 10	Organizatio	Account	Program	Activity	Location	Project	Cost	Percent .00	Encumbrance Override End Date Remove	
1	Q 10	Q 1701	Q 61200	Q 0103	۹				25.00		Click the remove
1	Q 340231	Q 4155	Q 61200	Q 0609	٩				75.00		that has 0.00%
											entered. Then click on "Save and Add
Default from Index	Save and Add	New Rows	<		~			Total:	100.00)	New Rows.

16. Routing Queue

- a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- b. For Overloads, all EPAFs must have a Chair and Dean level approval.
- c. For Grants, all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office. Other approval levels will default.
- d. For Continuing Education courses, add <u>Dean, Graduate and Continuing Education and Continuing Education (Marilyn</u> <u>Read).</u>

Approval Queue

Approval Level	User Name		Required Action	Remove
10 - (CHAIR) Chair	, ۹,		Approve	-
15 - (DEAN) Dean	, ۹		Approve	-
39 - (ACAFF1) Academic Affairs (Hayley)	HMURRELL	Hayley H Murrell	Approve	-
40 - (ACDAFF) Academic Affairs	CBALLARD	Cheryl M Ballard	Approve	-
45 - (PROVOS) Provost of Academic Affairs	CMCADAMS	Charles Alan McAdams	Approve	-
50 - (HRFYI) HR FYI	SMPHILLIPS	Samantha Myers Phillips	FYI	-
65 - (BUDGET) Budget Office		Beverly Coons Lindsey	Approve	-
70 - (PAYROL) Payroll FYI (Monthly)	MPHILLIPS	Mary Ruth Phillips	FYI	-
75 - (HRDIR) Human Resource Director	LGIGER	Lisa Weeks Giger	Approve	-
99 - (SUPER) Superuser	MPHILLIPS	Mary Ruth Phillips	Apply	-
Not Selected	, Q [Not Selected	•
Not Selected	, ۹		Not Selected	v
Not Selected	Search		Not Selected	•
Not Selected	, Q [Not Selected	•

Save and Add New Rows

17. Click on the "Save and Add New Rows".

18. Comments

- a. In the "Comments" section, enter comments for the approvers with an explanation for the action.
- b. In the "Comment" section, also enter the following for overload information separated as shown below:
 - i. CRN #:
 - ii. Credit Hour:
 - iii. Course Number:
 - iv. Course Title:
 - v. Section:
 - vi. Enrollment:
 - vii. Reason for Adjunct:

Comment



Enter additional information here.

Enter: CRN #: | Credit Hour: | Course #: | Course Title | Section: | Enrollment: | Reason for Adjunct: | and whether the course is offered through Continuing Education.

19. Save EPAF

- a. Hit the "Save" Button at the bottom of the form.
- b. Return to the top of the form.
- c. The message should display "Your change was saved successfully."
- d. Check your date entry

Electronic Personnel Action Form

Your change was saved successfully. Enter the information for the EPAE and either Save or Submit

Name and ID:	Olivia Caden Silver, 900127334	
Transaction:	1637	Query Date: Jun 01, 2016
Transaction Status:	Waiting	
Approval Category:	Summer School Adjunct Rehire, D00042	2
Save Submit	Delete	

20. Submit EPAF

- a. Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
- b. The EPAF automatically routes to the approvers in the order of their approval levels.

Electronic Personnel Action Form

The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Name and ID:	Olivia Caden Silver, 900127334	
Transaction:	1637	Query Date: Jun 01, 2016
Transaction Status:	Pending	
Approval Category:	Summer School Adjunct Rehire, D00042	

How to Process:

One Time Payment – Extra Services (Non Academic Affairs) One Time Payment – Extra Services (Academic Affairs)

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to process payment for additional duties/services performed. The steps below should be followed:

- 1. Enter the employee's 900# or click on the \bigcirc magnifying glass to search for an employee's 900#.
- The query date will default to today's date. Change the query date to the first day of the month in which the pay is to be issued. MM/01/20___
 - EXAMPLE: 01/01/2018 OR 02/01/2018 OR 03/01/2018
- Select One Time Payment Extra Services (Non Academic Affairs) or One Time Payment Extra Services (Academic Affairs) from the drop down approval category box.

Non Academic Affairs = <u>any departments that do not report to the Provost</u>, but report to other Vice Presidents/Directors. This EPAF is used for payments by departments that do not report to the Provost.

Academic Affairs = <u>departments that report to the Provost</u>. This EPAF is used for payments made by departments/divisions that report directly to the provost.

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE FRIST DAY OF THE MONTH YOU WANT THE TRANSACTION TO TAKE PLACE. IF IT IS NOT SET TO THE CORRECT DATE, IT WILL CAUSE AN ERROR AND YOU WILL HAVE TO RESTART THE EPAF.

	★ - indicates a required field.	After identifying an employee, click the
	ID: 900124058 Rylee Olivia Donovan 4° Q	the EPAF for One Time Payment – Extra
\rightarrow	Query Date: MM/DD/YYY (11/01/2015	Payment – Extra Services (Academic Affai
	Approval Category: One Time Payment - Extra Services (Non Academic Affairs), D00007	<u> </u>
	Go	
	Fundamental Anniananta	The Employee Job Assignments sho
	Type Position Suffix Title Time Sheet Organization Start Date End Date ast Paid Date	all active positions. By clicking the A
	Primary 000921 00 Assistant Director 4113, Human Resource Oct 01, 2015	Active and previous jobs.

- EPAF Approver Summary | EPAF Originator Summary
- 4. Click on "Go" to begin the One Time Payment Extra Services (Non Academic Affairs) or One Time Payment Extra Services (Academic Affairs) EPAF.

5. Enter the correct position numbers in the format indicated below and click on "GO". If a position number has already been assigned to the employee, select the radial dial at the end of the line and click on "GO". It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.

Position #:	Suffix #:	Description
000458	00	One-Time Payments – Extra Services paid by Org. 3001.
004010	00	One Time Payments – Extra Services paid to FACULTY by fund 10 monies. The fund #s start with 10.
004011	00	One Time Payments – Extra Services paid to STAFF by fund 10 monies. The fund #s start with 10.
004025	00	One Time Payments – Extra Services paid to FACULTY by other funds (not grants). The fund #s usually start with 108. (Example: 108221)
004026	00	One Time Payments – Extra Services paid to STAFF by other funds (not grants). The fund #s usually start with 108. (Example: 108221)
004030	00	One Time Payments – Extra Services paid to FACULTY by grant funding. The fund #s usually start with "3" (Example: 340231)
004031	00	One Time Payments – Extra Services paid to STAFF by grant funding. The fund #s usually start with "3" (Example: 340231)
000478	00	One Time Payments – Extra Services paid by Continuing Education – Org. 3005
000997	00	One Time Payments – Extra Services paid by Continuing Education - Org. 3017; generally used only by Continuing Education.
001202	00	First Year Seminar

New EPAF Job Selection

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

 ID:
 Rylee Olivia Donovan, 900124058

 Query Date:
 Nov 01, 2015

 Approval Category: One time Payment (Extra Serv), D00007

Overload/Add Job, C00006

Search	Туре	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New ob	004026	00	liscellaneous Position Fund 25	41211, Other General Institutional					
										۲
	Primary	000921	00	Assistant Director	4113, Human Resource	Oct 01, 2015			Active	
										0
All Jo	bs									

Next Approval Type Go

- 6. View Employee Class:
 - o This section allows the originator to view the current employee's employment information.
 - Employment Status must equal (A) Active.
 - o If employment status is listed something else other than Active, do not use this EPAF.
 - o Listed below are the definitions of the Employee Class Code
 - These fields are not able to be changed.

Employee Class Description	Employee Class Definition	Payroll ID
F1, Faculty 9/12	Faculty employee employed for 9 months and paid over 12 months	M1 payroll
F2, Faculty 9/9	Faculty employee employed for 9 months and paid over 9 months	M2 payroll
F4, Faculty 12/12	Faculty employee employed for 12 months and paid over 12 months	M1 payroll
F3, Faculty PT < 9 months	Adjunct faculty	M2 payroll
S1, Full Time Staff	Staff employee employed for 12 months and paid over 12 months	M1 payroll

S2, Part-Time Staff < 9 Months	Staff employee employed for less than 9 months and payment may vary	M2 payroll
S3, Part-Time 9-10 Month Staff	Staff employee appointment over 9-10 months	M1 or M2 payroll
S4, Part-Time 11-12 Month Staff	Staff employee paid over 12 months	M1 payroll
RT, PERS Reemployment of Retiree	Employee retired from the Public Employees' Retirement System	M1 or M2 payroll
ST, Student (WSR, RSE)	Student employee receiving extra compensation for extra duties performed	M2 payroll
GA, Graduate Assistant	Graduate Assistant receiving extra compensation for extra duties performed	M2 payroll
TE, Temporary Employee	Temporary Employee receiving extra compensation for extra duties performed	BW, M1 or M2 payroll

View Employee Employment Class

Item	Current Value	New Value	The Employee Class Code will most of
Employee Class Code: (Not Enterable)	S1, Full Time Staff	← ←	the time tell you which payroll ID to use from the table above when
Employee Status: *(Not Enterable)	Active	A	processing an EPAF.

7. Enter Overload Pay Information

Field	Statement/Action	Action/Example
Job Begin Date:	If statement below says "Last Paid Date:"then	Leave field blank
	Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 Overload ENG 10 Last Paid Date: May 31, 2014	
	Item Current Value New Value	
	Job Begin Date: MM/DD/YYYY	l
	If there is no current values in the "Current Value" fields,then	Enter:
	Overload/Add Job, 004026-00 Miscellaneous Position Fund 25	(enter corresponding year)
	Item Current Value New Value	01/01/2018 or
	Job Begin Date: MM/DD/YYY	02/01/2018 or
		MM/01/20
Job Effective	Enter the first day of the month for which the one-time payment – extra services are to be paid	01/01/2018 or
Date:		02/01/2018 or
		MM/01/20
Job Personnel	Enter the first day of the month for which the one-time payment – extra services are to be paid. This	01/01/2018 or
Date:	date should match the "Job Effective Date"	02/01/2018 or
		03/01/2018
Contract Type:	This field defaults to "Overload" Field may be changed to either Primary or Secondary	MM/01/20
Title:	Enter the description of the one time payment – extra services performed	Example:
	Overload/Add Job, 004026-00 Miscellaneous Position Fund 25	
	Item Current Value New Value	Basketball Licket Worker
	Job Begin Date: MM/DD/YYYY 11/01/2015	First Year Seminar Instructor
	Jobs Effective Date: MM/DD/YYYY 111/01/2015 Personnel Date: MM/DD/YYYY 111/01/2015	(used pos 001202 00)
	Contract Type: Overload	
	Title: * Basketball Ticket Worker	
Annual Salary:	Total amount to be paid for one time payments – extra services	100.00
		0.00
Employee Class Code	Field is defaulted to S3	
Payroll ID	Payroll ID will default to M2. Field can be change. If the employee class under the "View Employee	Use the drop down box to
	Employment Class" is S1, S4, F1, or F4, orthen	change to M1.
	•	

	If the employee class under the "View Employee Employment Class" is S2, F2, F3, ST, GAthen	Payroll ID should ramain defaulted to M2.
	If the employee class under the "View Employee Employment Class" is RT, TE, S3then the payroll ID will be determined based on previous job assignments. View Employee Employment Class Item Current Value Employee Class Code: (Not Enterable) New Value Employee Status: *(Not Enterable) Active	Payroll ID will either be M1 or M2 based on previous job assignments.
Leave Rept Pay	The Leave Report Pay ID should match the Payroll ID above.	Match Leave Rept Pay ID to Pavroll ID (either M1 or M2)
Job Change Reason	Field cannot be changed. Information is defaulted.	
Step	Field cannot be changed. Information is defaulted.	
Job Status	Field cannot be changed. Information is defaulted.	

Overload/Add Job, 004026-00 Miscellaneous Position Fund 25

Item	Current Value N	lew Value	
Job Begin Date: MM/DD/YYYY		08/01/2016	
Jobs Effective Date: MM/DD/YYYY		08/01/2016	
Personnel Date: MM/DD/YYYY		08/01/2016	
Contract Type:		Overload v	
Title: *		Basketball Ticket Worker	
Annual Salary: \star		50.00	
FTE: *			
Employee Class Code: *	Q	S3	
Payroll Id: *		M1, Monthly	~
Time Entry Type: (Not Enterable)		Ρ	×
Time Entry Type: (Not Enterable)		N	\sim
Leave Rept Pay ID: *		M1, Monthly	~
Job Change Reason: (Not Enterable))	ONE	\sim
Step: (Not Enterable)		0	2
Job Status: (Not Enterable)		A	

8. Update Factor, Pays, and Hours

Field	Statement/Action	Action/Example
Factor:	The field will default to one. If the payment is to be paid over multiple months, then change the field to represent the number of months to be paid	If the payment will be paid over 2 months, then enter 2 in the "Factor" field.
Pays:	The field will default to one. The field must match the number of pays enter in the "Factor" Field	The Pays number will be 2 if this payment will be paid over 2 months.
Hours per Pay:	Field cannot be changed. Information is defaulted.	None
Job Effective Date:	Enter the first day of the month in which this one-time payment is to be paid	01/01/2018 or 02/01/2018 or 03/01/2018 MM/01/20

Update Factors, Pays and Hours, 004026-00 Miscellaneous Position Fund 25



Enter the same number in the factor and pays field in which the one time payment is to be paid. Enter the first day of the month in the Jobs Effective Date.

9. Update Default Earnings

g. In the "CURRENT" section – If there is not a date entered under the effective date, then a new effective date will need to be entered under the "NEW VALUE" section.

If a current date is not listed under the "CURRENT" effective date, then enter the first day of	Update Default Earning Current Effective Dr.elEarnings Ho	gs, 004026-00 Miscellaneous Posi ours or Units Per Pay Deemed Hours S	tion Fund 25 pecial Rate Shif	End Date	
the month in which the one - time payment will be issued in the "NEW VALUE EFFECTIVE	New Value Effective Date M //DD/YYY	Y Earnings Not Selected	Hours or	r Units Per Pay Deemed Hours Special Rate	ShiftEnd Date MM/DD/YYYY Remove
DATE" field. MM/01/20,		Not Selected	•		
EX. 06/01/2017		Not Selected	•		
		Not Selected	•		
	Save and Add New Rows				

- h. Enter the first day of the month in which the one-time payment will be issued in the "NEW VALUE EFFECTIVE DATE" field. MM/01/20_ EXAMPLE: 02/01/2018
- i. Select REG, Regular as the Earnings Code using the drop down box.
- j. Enter **84.00** as the Hours or Units Per Pay.

Update Default Earnings, 004026-00 Miscellaneous Position Fund 25

Current Effective Date Earnings	Hours or Units Per Pay Deemed	Hours Special Rate S	Shift End Date		
New Value				0	
11/01/2015	REG, Regular Pay	Hours -	84.00	ours Special Rate	
	Not Selected	•			
	Not Selected	•			
	Not Selected	•			
Save and Add New Rows					

Current						
Effective Date Earning 07/01/2014 REG, R	js Hours or Units Per Pay egular Pay 84.00	Deemed Hours Speci	I Rate Shift End Dat 1	Ð		
New Value	VVVEarnings	Hours	or Units Por Pay/De	emed Hours Special Pa	to Shift End Date MM	
07/01/2014	REG, Regular Pay		84.00			DDITTT Remove
	Not Selected	•			Enter the 1s	^t dav of the month ir
	Not Selected	•			which the p EXAMPLE:	ayment is to be paid 02/01/2018
	Not Selected	•				
	Not Selected	T				

Update Default Earnings, 004030-00 HRSA Nursing, Last Paid Date: Jun 30, 2015

Current						
Effective Date Earnings	Hours or Units	Per Pay Deemed Hours	Special Rate Shift End I	Date		
07/01/2014 REG, Reg	ular Pay	84.00	1			
New Value						
Effective Date MM/DD/YY	YYY Earnings		Hours or Units Per Pay	Deemed Hours Special Ra	ate Shift End Date MM/	DD/YYYY Remove
11/01/2015	REG, Regular Pay	•	84.00			
	Not Selected	•				
	Not Selected	•				
	Not Selected	•				
	Not Selected	•				

Defaulting values for Default Earnings from the Job records.
 Save and Add New Rows

9. Terminate Employee Job

Field	Statement/Action	Action/Example
Job Effective Date:	Enter the last day of the month in which the payment is to be paid	11/30/2016
Job Status:	Field cannot be changed. Information is defaulted.	None
Job Change Reason:	Field cannot be changed. Information is defaulted.	None

Terminate Job Only, 004026-00 Miscellaneous Position Fund 25



Enter the last day of the month in which payment is to be paid. MM/31/20__ or MM/30/20__ EXAMPLE: 02/28/2018

10. Labor Distribution – Update if Needed

- a. In the "CURRENT" section the current labor codes and the effective date of the last change will default into the form.
- b. In the "NEW" section add new rows or make changes to the existing rows.
- c. EFFECTIVE DATE: The effective date is the first day of the month in which the payment will be made: MM/01/20_____ EXAMPLE: 02/01/2018
- d. Apply the appropriate changes to the field if necessary.

Steps to change Labor Distributions

1. To remove the default payment information, change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.

Update Labo Current Effective Date COA Index Fu	or Distributio : 11/01/2015 nd Organization	ons, 004026- on Account Pi	00 Miscella rogram Activi	neous Positi y Location Pr	on Fund 25	The effective date will default to the query date or today's date. This needs to be change to the following the first day of the month in which the payment is to be paid.			
New Effective Date	: MM/E D/YYYY	Y 11/01/2015			EXAMPLE: 02/01/2018				
COA Index	Fund	Organiz	ation Accour	t Progra	m Activi	ty Locat	ion Project	Cost	t Percent Encumbrance Override End Date
			1 Q 6130						Change this percentage to 0.00 and click on Save and Add New Rows.
Default from In Update Labor I Current Effective Date: 1 COA Index Fund	Distributions	nd Add New Row ;, 004026-00 I Account Progra	Miscellaneou	s Position F	und 25 Cost Percent	Encumbrance (Dverride End Da	Total:	al 100.00
Effective Date: N	IM/DD/YYYY 1	1/01/2015							
COA Index	Fund	Organizatior	n Account	Program	Activity	Location Pr	oject Cost	Percer	ent Encumbrance Override End Date
× 1	4 108601	41211	61300	0605	4			0.0	
				~	4				
▼ Default from Index	x Save and A	dd New Rowe		*	*		Total	100.	0.00

- 2. Enter the new accounting information. The following must be entered for each line.
 - a. COA = enter 1.
 - b. Fund No.
 - c. Organization No.
 - d. Account No. =
 - i. 61100 = Administrative
 - ii. 61200 = Faculty
 - iii. 61300 = Paraprofessional
 - iv. 61400 = Secretarial/Clerical

- v. 61500 = Technical
- vi. 61600 = Skilled Craft
- vii. 61700 = Service Maintenance
- e. Percentage = totals must equal 100%. See sample below

Click to "Save and Add New Rows"

Update Labor Distributions, 004026-00 Miscellaneous Position Fund 25

Curre	nt												
Effect	ive Date: 1	1/01/2015											
COA	ndex Fund	Organization	Account Progr	am Activity I	Location Project	t Cost Percer	t Encumbrance O	verride End Da	e				
New													
Effect	ive Date: M	MM/DD/YYYY 1	1/01/2015										
COA	Index	Fund	Organizatio	n Account	Program	Activity	Location Pro	oject Cost	Percent Er	cumbrance Overric	de End Date Rer	nove	
Q 1		Q 108601	Q 41211	61300	Q 0605	Q			.00				Enter COA. Fund #. Org#. and
													Account# and nercontage
Q 1		Q 108522	4021	61300	Q	Q.			100				Account# and percentage.
9	_	Q	Q	Q	Q	Q							Be sure percentages = 100%.
9	_	Q	Q	Q	Q	Q							
		Q	Q	Q	Q	Q							
				,				Total					
									.00				
Defe	ult from Indo	Save and I	dd New Dewe										
Deta	uit irom inde	save and P	du New Rows										

- 3. Click on the box under the "Remove" Column to remove the old accounting information. The percentage should be set 0.00%.
- 4. Click on Save and Add New Rows. The old accounting information should be removed.

Update Labor Distributions, 004026-00 Miscellaneous Position Fund 25 Current Effective Date: 11/01/2015 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date New										Click the remove button on the line that has 0.00% entered. Then click on "Save and Add New Rows.		
Effective Date: MI	M/DD/YYYY 1	1/01/2015								-		
COA Index	Fund	Organizatio	n Account	Program	Activity	Location	Project	Cost	Percent Encumbra	ance Override End	I Date Remove	
Q 1	Q 108601	Q 41211	Q 61300	Q 0605	٩				.00		(⊵)	
Q 1	Q 108522	4021	61300	9	9				100			
9	9	Q	9	Q	9							
9	9	Q	9	Q	9							
9	9	Q	9	9	9							
Default from Index	Save and A	Add New Rows	<					Total:	.00			

Update Labor Distributions, 004026-00 Miscellaneous Position Fund 25

Effective Date: 11/01/2015

COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New											
Effectiv	Effective Date: MM/DD/YYYY 11/01/2015										
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date Remove
Q 1		Q 108522	4021	61300	Q 0501	Q				100.00	
۹ 🗆		Q.	9	9	9	9					
9		9	9	۹ 🗌	9	9					
9		9	9	9	Q	9					
9		۹.	Q	۹ 🗌	9	9					
					Search				Total:	100.00	
Defau	It from Index	Save and Ad	d New Rows								

5. Routing Queue

Non Academic Affairs:

- a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- b. All EPAFs must have a Director and Vice President level approval.
- c. Grants One-Time Payment Extra Services, <u>all EPAFS must have a Director, Vice President, Grants, and Grants Budget</u> <u>Office</u>. This can be added to bottom of the queue. Other approval levels will default.

d. EXAMPLE ROUTING QUEUE:

- i. Dept (Director/Supervisor)
- ii. Vice President
- iii. HRFYI Human Resources FYI = Samantha Phillips (SMPHILLIPS)
- iv. Budget = Beverly Lindsey (BLINDSEY)
- v. Payroll = Mary Ruth Phillips (MPHILLIPS)
- vi. HR Director = Lisa Giger (LGIGER)
- vii. Super = Mary Ruth Phillips (MPHILLIPS)

Academic Affairs

- e. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- f. For Academic One-Time Payment Extra Services, all EPAFs must have a Chair and Dean level approval.
- g. For Academic Grants One-Time Payment Extra Services, <u>all EPAFS must have a Chair, Dean, Grants, and Grants</u> <u>Budget Office</u>. Other approval levels will default.
- h. For Academic One-Time Payment Extra Services Continuing Education, add <u>Dean, Graduate and Continuing Education</u> and Continuing Education (Marilyn Read). This can be added to the bottom of the queue.

i. EXAMPLE ROUTING QUEUE:

- i. Chair
- ii. Dean
- iii. Academic Affairs = Cheryl Ballard (CBALLARD)
- iv. Provost = Dr. Charles McAdams (CMCADAMS)
- v. HRFYI Human Resources FYI = Samantha Phillips (SMPHILLIPS)
- vi. Budget = Beverly Lindsey (BLINDSEY)
- vii. Payroll = Mary Ruth Phillips (MPHILLIPS)
- viii. HR Director = Lisa Giger (LGIGER)
- ix. Super = Mary Ruth Phillips (MPHILLIPS)

- 6. Click on the "Save and Add New Rows".
- 7. Comments
 - a. In the "Comments" section, enter comments for the approvers with an explanation for the action. Be sure to include the dates when the extra duties occurred.



Electronic Personnel Action Form	
The transaction has been successfully submitted.	
Name and ID: Rylee Olivia Donovan, 900124058 Transaction: 876 Transaction Status: Pending	Query Date: Nov 01, 2015
Approval Category: One Time Payment - Extra Services (Non Academic Affairs), D00007	

Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Errors and Warning Messages		
Туре	Message Type	Description
Add Employee Job	WARNING	*WARNING* This employee is terminated on the Employee Form.
Add Employee Job	WARNING	*WARNING* The Employee's Term Date and Reason should be removed from PEAEMPL.
Add Employee Job	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
Update Factors, Pays and Hours	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
indicates a second field		·

* - indicates a required field.

<u>Delete</u>

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and all you to start over.

TERMINATION/RESIGNATION OF EMPLOYEE Accessing the EPAF Menu & Approver Summary

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to terminate an employee's job when they are leaving the University. The steps below should be followed:

- 1. Enter the employee's 900# or click on the \bigcirc magnifying glass to search for an employee's 900#.
- 2. The query date will default to today's date. Change the query date to the effective date of the termination/resignation. For example:
 - If an employee's last physical day at work is January 31, 2018, and personal leave time and/or comp are not being used, then January 31, 2018 will be used as the last day of employment and termination/resignation.
 - If an employee's last physical day at work is January 26, 2018, but plan on using personal leave time and/or comp time until January 31, 2018, then January 31, 2018 will be used as the last day of employment and termination/resignation.
- 3. Select Termination from DSU (Non Academic Affairs) or Termination from DSU (Academic Affairs) from the drop down approval category box.

Non Academic Affairs = <u>any departments that do not report to the Provost</u>, but report to other Vice Presidents/Directors. This EPAF is used for changes to positions in departments that do not report to the Provost.

Academic Affairs = <u>departments that report to the Provost</u>. This EPAF is used for changes to faculty/staff positions in departments/divisions that report directly to the provost.

A LETTER OF RESIGNATION MUST BE SUBMITTED FOR ALL EMPLOYEES VOLUNTARILY RESIGNING.

- ACADEMIC AFFAIRS EMPLOYEE RESIGNATION LETTERS MUST BE SENT TO THE PROVOST'S OFFICE.
- NON ACADEMIC AFFAIRS EMPLOYEE RESIGNATION LETTERS MUST BE SENT TO HUMAN RESOURCES.

TERMINATION/RESIGNATION PROCESS FOR INDIVIDUALS WHO ARE CLASSIFIED AS 12 MONTH EMPLOYEES. Use for both Monthly & Bi-Weekly employees

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DAY YOU WANT THE END THE PAY FOR THE EMPLOYEE WHO IS LEAVING AND NOT THE LAST DAY THE EMPLOYEE IS IN THE OFFICE. IF IT IS NOT SET TO THE CORRECT DATE, THE EMPLOYEE WILL EITHER BE PAID TO OR MUCH OR NOT ENOUGH.

Т

New EPAF Person Selection	After identifying an employee.
 Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Se • indicates a required field. ID: 900137172 Rylie Ann Clark Query Date: MM/DD/ (YYY) 01/31/2018 Approval Category: Termination from DSU (Non Academic Affairs), D00010 	click the Approval Category drop down menu to select the EPAF for Termination from DSU (Non Academic Affairs) or Termination from DSU (Academic Affairs).
Go Employee Job Assignments Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date Status Primary 000376 00 Grants Coordinator 4113, Human Resource Jan 01, 2017 Active All Jobs Image: Contract Status Image: Contract Status Image: Contract Status Image: Contract Status	The Employee Job Assignments show all active positions. By clicking the All Jobs button, it will display all current and previous jobs.

- 4. Click on GO to begin processing the EPAF.
- 5. Click the radial button at the end of the row for the **PRIMARY JOB** and click **GO**.

New EPAF Job Selection

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

ID:	Rylie Ann Clark, 900137172
Query Date:	Jan 31, 2018
Approval Category:	Termination from DSU NAA, D00010

Terminate Job Only, C00003

Sean Q	h Type New Job	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select	Find the primary job and click the radial button at the end of the job to select the job and
	Primary	000376	00	Grants Coordinator	4113, Human Resource	Jan 01, 2017			Active	۲	CIICK GO.
All Go	lobs										

- 6. In the Jobs Effective Date field, enter the date the employee is to receive pay through.
- 7. In the Last Work Date field, enter the last day the employee was physically at work
- 8. In the Term Reason Code field, select the reason for termination/resignation by using the drop down box.
- 9. In the Termination Date field, enter the last day the employee is to receive pay through.

Terminate Job Only, 000376-00 Grants Coordinator



10. Routing Queue

Non Academic Affairs:

- a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- b. All EPAFs must have a Director and Vice President level approval.
- c. Grants Termination from DSU, <u>all EPAFS must have a Director, Vice President, Grants, and Grants Budget Office</u>, This can be added to bottom of the queue. Other approval levels will default.

d. EXAMPLE ROUTING QUEUE:

- x. Dept (Director/Supervisor)
- xi. Vice President
- xii. HRFYI Human Resources FYI = Samantha Phillips (SMPHILLIPS)
- xiii. Budget = Beverly Lindsey (BLINDSEY)
- xiv. Payroll FYI = Mary Ruth Phillips (MPHILLIPS)
- xv. HR2 = Jasmine Cunningham (JCUNNINGHAM)
- xvi. HR Director = Lisa Giger (LGIGER)
- xvii. Super = Mary Ruth Phillips (MPHILLIPS)

Academic Affairs

- a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- b. For Academic Termination from DSU, all EPAFs must have a Chair and Dean level approval.
- c. For Academic (Grants) Termination from DSU, <u>all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office,</u> Other approval levels will default.

d. EXAMPLE ROUTING QUEUE:

- xviii. Chair
- xix. Dean
- xx. Academic Affairs = Cheryl Ballard (CBALLARD)
- xxi. Provost = Dr. Charles McAdams (CMCADAMS)
- xxii. HRFYI Human Resources FYI = Samantha Phillips (SMPHILLIPS)
- xxiii. Budget = Beverly Lindsey (BLINDSEY)
- xxiv. Payroll FYI = Mary Ruth Phillips (MPHILLIPS)
- xxv. HR2 = Jasmine Cunningham (JCUNNINGHAM)
- xxvi. HR Director = Lisa Giger (LGIGER)
- xxvii. Super = Mary Ruth Phillips (MPHILLIPS)
- 11. Click on the "Save and Add New Rows".

12. Comments

a. In the "Comments" section, enter comments for the approvers with an explanation for the action.



Comment

Employee's last day is January 26, 2018; however, will be using personal leave time for January 29-31, 2018.

EXAMPLE of what a comment might contain.

13. Save EPAF

- a. Hit the "Save" Button at the bottom of the form.
- b. Return to the top of the form.
- c. The message should display "Your change was saved successfully."
- d. Check your date entry

Electronic Personnel Action Form Your change was saved successfully. Enter the information for the EPAF and either Save or Submit Name and ID: Rylie Ann Clark, 900137172 Iob and Suffix: 000376-00, Grants Coordinator Guery Date: Jan 31, 2018 Transaction: Status: Waiting Approval Category: Termination from DSU (Non Academic Affairs), D00010 Save Submit Delete

14. Submit EPAF

- h. Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
- i. The EPAF automatically routes to the approvers in the order of their approval levels.



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

<u>Delete</u>

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

TERMINATION/RESIGNATION PROCEDURE FOR INDIVIDUALS WHO ARE 9 MONTH EMPLOYEES

FACULTY EMPLOYEES

1. A faculty member who terminates/resigns at the end of the academic session, then the following dates must be used.

F1 Employee Class: The job effective date will be ended on August 31, 2018; however, the last work date will be May 7, 2018 or the last day of the academic session.

F2 Employee Class: The job effective date will be ended on May 31, 2018; however, the last work date will be May 7, 2018 or the last day of the academic session.

A LETTER OF RESIGNATION MUST BE SENT TO THE PROVOST'S OFFICE FOR ALL EMPLOYEES VOLUNTARILY RESIGNING.

EXAMPLE OF A TERMINATION/RESIGNATION OF AN F1 EMPLOYEE TERMINATION

View Employee Employment C	lass			
Item	Current Value	New Value		
Employee Class Code: (Not Enterable	e) F1, Faculty 9/1	2		
Employee Status: *(Not Enterable)	Active	A		
Terminate Job Only,			Last	Paid Date: Jan 31, 2017
Item	Current Value	New Value		
Jobs Effective Date: MM/DD/YYYY*	09/01/2015	08/31/2018		
Job Status: *(Not Enterable)	Active	Т		
Job Change Reason: *(Not Enterable	e) PROMO	TERM		
Terminate Employee from DSU	J			
Item Ci	urrent Value New	Value		
Last Work Date: MM/DD/YYYY	05/	07/2018		
Term Reason Code: 🐅	V,	Voluntary		\sim
Termination Date: MM/DD/YYYY	08/	31/2018		

EXAMPLE OF A TERMINATION/RESIGNATION OF AN F2 EMPLOYEE TERMINATION

View Employee Employment Class

Item	Current Value	New Value	
Employee Class Code: (Not Enterable)	F2, Faculty 9/9		
Employee Status: *(Not Enterable)	Active	A	
Terminate Job Only,		Last Pai	id Date: Jan 31, 2017
Item	Current Value	lew Value	
Jobs Effective Date: MM/DD/YYYY	09/01/2015	05/31/2018	
Job Status: *(Not Enterable)	Active	Т	
Job Change Reason: *(Not Enterable)	RAISE	TERM	
Terminate Employee from DSU			

Item	Current Value New Value	
Last Work Date: MM/DD/YYYY	05/07/2018	
Term Reason Code: 🜟	V, Voluntary	,
Termination Date: MM/DD/YYYY	05/31/2018	

UPDATE LABOR DISTRIBUTIONS Accessing the EPAF Menu & Approver Summary

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to change the labor distributions for a position which is already entered in the system. This will mainly apply to employees working on grants where the grant fund number changes annually, or for positions where the source of funding has changed. The steps below should be followed:

- 10. Enter the employee's 900# or click on the $^{\bigcirc}$ magnifying glass to search for an employee's 900#.
- 11. The query date will default to today's date. Change the query date to the effective date of the change. For faculty/staff paid monthly, this will usually be the first day of the month in which the change takes effect; for hourly employees on bi-weekly payroll, this will usually be the first day of the next bi-weekly pay period. For some grants, however, this will be another date.
 - EXAMPLE: 09/01/2017 (Monthly) OR 06/16/2017 (BW13) OR 09/29/2017 (Grant start date)
- 12. Select Job Labor Distribution Change (Non Academic Affairs) or Job Labor Distribution Change (Academic Affairs) from the drop down approval category box.

Non Academic Affairs = <u>any departments that do not report to the Provost</u>, but report to other Vice Presidents/Directors. This EPAF is used for changes to positions in departments that do not report to the Provost.

Academic Affairs = <u>departments that report to the Provost</u>. This EPAF is used for changes to faculty/staff positions in departments/divisions that report directly to the provost.

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DAY YOU WANT THE CHANGE TO TAKE PLACE. IF IT IS NOT SET TO THE CORRECT DATE, IT WILL CAUSE AN ERROR AND YOU WILL HAVE TO RESTART THE EPAF.

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.	Dulia App Clark	# Q	
10. 1 900137172		U N	
Query Date: MM/DD/Y	YYY 06/01/2017		
Approval Category: •	Job Labor Distribution (Change (Academic Affairs), D00015	
Go			

After identifying an employee, click the Approval Category drop down menu to select the EPAF for Job Labor Distribution Change (Non Academic Affairs) or Job Labor Distribution Change (Academic Affairs).

Employee Job Assignments

EPAF Approver Summary | EPAF Originator Summary

The Employee Job Assignments show all active positions. By clicking the All Jobs button, it will display all current and previous jobs.
$^{
earrow}$ Enter or search for a new position number and enter the suffix, or select the link under Title.

 ID:
 Rylie Ann Clark, 900137172

 Query Date:
 Jun 01, 2017

 Approval Category:
 Update Labor Dist NAA, D00016

Update Labor Distributions, C00010

Search	Туре	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job									
										۲
	Primary	000376	00	Grants Coordinator	4113, Human Resource	Jan 01, 2017	,		Active	0
										0
	1									

All Jobs

- 4. Click on "Go" to begin the Job Labor Distribution Change (Non Academic Affairs) or Job Labor Distribution Change (Academic Affairs)
- 5. In the "CURRENT" section the current labor codes and the effective date of the last change will default into the form.
- 6. In the "NEW" section add new rows or make changes to the existing rows.
- EFFECTIVE DATE: The effective date is the first day of the month in which the payment will be made: MM/01/20_____
 EXAMPLE: 06/01/2017

Update Labor Distributions, 000376-00 Grants Coordinator

Currer	ıt							_	The effect	ive date v	will default to the	e query date o
Effecti	ffective Date: 01/01/2017							today's date. This needs to be change to the following				
COA Ir	OA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override Er							the first day of the month in which the navment is to				
1	10	4113	61300 0605			100.00			be paid.	.y or the		
Vew E ffecti	ve Date: M	IM/DD/YYYY	06/01/2017					\rightarrow	EXAMPLE	: 02/01/20)18	
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	e
۹ 1		Q 10	Q 4113	Q 61300	Q 0605	۹.				100.00		
2		_ Q	Q	۹ 🛛	_ Q	_ Q						
2		_ Q	Q	۹ 🛛	_ Q	_ Q	_					
۹ 🕅		٩,	Q	۹.	_ Q	۹.	_	_				
م ز	i –	- Q		9		- a	_	_	í	- i		
,	,	,	,			,		,	Total:	100.00)	

Defaulting values for Labor Distribution from the Job records.
 Default from Index Save and Add New Rows

- 8. Under "New" make any necessary changes to the Fund, Organization, or Account
 - a. COA = enter 1.
 - b. Fund No.
 - i. General university budget funds, Fund 10
 - ii. Other funds (not grants) The fund numbers usually start with "108" (ex. 108221)
 - iii. Grants The fund numbers usually start with "3" (ex. 340231)
 - c. Organization No.
 - d. Account No. =
 - i. 61100 = Administrative
 - ii. 61200 = Faculty
 - iii. 61300 = Paraprofessional
 - iv. 61400 = Secretarial/Clerical
 - v. 61500 = Technical
 - vi. 61600 = Skilled Craft
 - vii. 61700 = Service Maintenance
 - e. Percentage = totals must equal 100%. See sample below

v active Da	te: MM/DD/VVVV	01/2017						Ente Acc Be s	er COA, I count# an sure perc	Fund #, Org# nd percentag centages = 1	[‡] , and e. 00%.
A Inde	Ex Fund	Organization	Account	Program	Activity	Location F	Project	Cost	Percent	Encumbrance Override End Date	Remove
1	Q 10	Q 4113	Q 61300	Q 0605	٩			7	75.00		
L	Q 340231	4113	Q 61300	Q 0605	٩				25.00		
	٩,	Q.	Q	Q	Q.						
—i—	٩	_ Q	۹. 	۹.		i — i			-i		
	۹ 🛛	Q	Q.	۹ 🛛	۹ [
fault from 1	index Save and Add M	New Rows							100.00)	
fault from 1	Index Save and Add M	New Rows							100.00)	
ew ffective	Index Save and Add M Date: MM/DD/YYY dex Fund	Vew Rows	on Account	Program	Activity	Location	Project	Co	100.00) ent Encumbra Override I Oate	nnce Rem End
ew ffective OA In	Index Save and Add M Date: MM/DD/YYY Idex Fund	V 06/01/2017 Organizati	ion Account	Program ۹. ₀₆₀₅	Activity ۹	Location	Project	Ca	100.00	ent Encumbra Override I Date	ince End
ew ffective OA In	Date: MM/DD/YYY dex Fund Q 340231	Vew Rows	ion Account ۹ 61300	Program Q. 0605	Activity	Location	Project	Ca	100.00	ent Encumbra Override 1 Date	Ince End
ew ffective OA In 1	Date: MM/DD/YYY dex Fund Q 340231 Q Q	V 06/01/2017 Organizati	Account Q 61300 Q	Program Q 0605 Q 0605	Activity		Project	Co	100.00	ent Encumbra Override I Date	nce End
ew ffective OA In	Date: MM/DD/YYY dex Fund 340231	Vew Rows	Account Q 61300 Q	Program	Activity		Project		100.00	ent Encumbra Override Date	nnce End
ew ifective DA In	Date: MM/DD/YYY dex Fund Q 340231	Vew Rows	Account Q 61300 Q	Program	Activity		Project		100.00	ent Encumbra Override I Date	End Rem
ew ffective OA In \$ 1 \$ 1	Date: MM/DD/YYY dex Fund Q 340231	Y 06/01/2017 Organizati	Account Q 61300 Q	Program Q. 0605 Q	Activity		Project	Co Co Co To To	100.00	ent Encumbra Override I Date	nce R End

9. Click "Save and Add New Rows"

11. Routing Queue

Non Academic Affairs:

- e. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- f. <u>All EPAFs must have a Director and Vice President level approval.</u>
- g. Grants One-Time Payment Extra Services, <u>all EPAFS must have a Director, Vice President, Grants, and Grants Budget</u> <u>Office</u>. This can be added to bottom of the queue. Other approval levels will default.

h. EXAMPLE ROUTING QUEUE:

- xxviii. Dept (Director/Supervisor)
- xxix. Vice President
- xxx. HRFYI Human Resources FYI = Samantha Phillips (SMPHILLIPS)
- xxxi. Budget = Beverly Lindsey (BLINDSEY)
- xxxii. Payroll = Mary Ruth Phillips (MPHILLIPS)
- xxxiii. HR Director = Lisa Giger (LGIGER)
- xxxiv. Super = Mary Ruth Phillips (MPHILLIPS)

Academic Affairs

- e. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- f. For Academic One-Time Payment Extra Services, all EPAFs must have a Chair and Dean level approval.
- g. For Academic Grants One-Time Payment Extra Services, <u>all EPAFS must have a Chair, Dean, Grants, and Grants</u> <u>Budget Office</u>. Other approval levels will default.
- h. For Academic One-Time Payment Extra Services Continuing Education, add <u>Dean, Graduate and Continuing Education</u> and Continuing Education (Marilyn Read). This can be added to the bottom of the queue.
- i. EXAMPLE ROUTING QUEUE:
 - xxxv. Chair
 - xxxvi. Dean
 - xxxvii. Academic Affairs = Cheryl Ballard (CBALLARD)
 - xxxviii. Provost = Dr. Charles McAdams (CMCADAMS)
 - xxxix. HRFYI Human Resources FYI = Samantha Phillips (SMPHILLIPS)
 - xl. Budget = Beverly Lindsey (BLINDSEY)
 - xli. Payroll = Mary Ruth Phillips (MPHILLIPS)
 - xlii. HR Director = Lisa Giger (LGIGER)
 - xliii. Super = Mary Ruth Phillips (MPHILLIPS)
- 13. Click on the "Save and Add New Rows".
- 14. Comments
 - b. In the "Comments" section, enter comments for the approvers with an explanation for the action.



14. Save EPAF

- e. Hit the "Save" Button at the bottom of the form.
- f. Return to the top of the form.
- g. The message should display "Your change was saved successfully."
- h. Check your date entry



15. Submit EPAF

- j. Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
- k. The EPAF automatically routes to the approvers in the order of their approval levels.

Electronic Personnel Action Form



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Delete

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

CAMPUS ADDRESS CHANGES Accessing the EPAF Menu & Approver Summary

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to change an employee's campus address. The steps below should be followed:

- 1. Enter the employee's 900# or click on the \bigcirc magnifying glass to search for an employee's 900#.
- 2. The query date will default to today's date. Change the query date to the effective date of the change. EXAMPLE: 02/01/2018 OR 02/16/2018 OR 07/09/2018
- 3. Select Campus Address Change (Non Academic Affairs) or Campus Address Change (Academic Affairs) from the drop down approval category box.

Non Academic Affairs = <u>any departments that do not report to the Provost</u>, but report to other Vice Presidents/Directors. This EPAF is used for changes to positions in departments that do not report to the Provost. <u>This EPAF is used for also for Academic Affairs staff</u> <u>positions</u>.

Academic Affairs = <u>departments that report to the Provost</u>. This EPAF is used for campus address changes to <u>FACULTY</u> positions <u>ONLY</u> in departments/divisions that report directly to the provost.

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DAY YOU WANT TO END THE CURRENT CAMPUS ADDRESS.

For example, an employee is moving to another office location on January 19, 2018. The query date entered will be January 18, 2018, because the "old" campus address will end on January 18, 2018.

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: 900137172 Rylie Ann Clark Query Date: MM/DD/YYYY 01/18/2018 Approval Category: Campus Address Change (Non Academic Affairs), D00023 	v	After identifying an employee, click the Approval Category drop down menu to select the EPAF for Campus Address Change (Non Academic Affairs) or Campus Address Change (Academic Affairs).
	EPAF Approver Summary EPAF Originator Su	mmary
RELEASE: 8.9.0.3	Return to EPAF Menu	The query date entered is the end date of the "old" campus address.
		Click the "GO" link to access the next screen.

- 4. Below is the screen to terminate the current or "old" campus address. The query date entered on the previous screen is the date the campus address will end.
- 5. Check the circle beside the current campus address and click **NEXT APPROVAL TYPE**.

Address Selection

To add a new record, choose New Record. Or, choose the record to be updated under Select.

ID: Rylie Ann Clark, 900137172 Query Date: Jan 18, 2018 Approval Category: Campus Address Change NAA, D00023

Terminate Current Campus Address

Туре	From and To Date	Address	Status	Select		
New Record				0	Click the circle t	peside the current s and click NEXT
Campus Address	Jan 01, 2015 to Current Date	DSU Box 3232 Broom 136	Active	۲	APPROVAL TY	PE.
		Cleveland, Mississippi 38732				
		United States of America				
d						

Address Type defaulted from Electronic Approval Category Form (NTRACAT).

Show All Addresses		
Next Approval Type	◀	

6. On the next screen, click on the circle to enter the new campus address.

PERMANENT ADDRESS CHANGES ARE NOT TO MADE THROUGH EPAFS. ONLY HUMAN RESOURCES IS AUTHORIZED TO MAKE A PERMANENT ADDRESS CHANGE.

Address and Telephone Selection

To add a new record, choose New Record. Or, choose the record to be updated under Select.

ID:	Rylie Ann Clark, 900137172
Query Date:	Dec 18, 2017
Approval Category:	Campus Address Change NAA, D00023

Campus Address Add/Change

Go

Туре	From and To Date	Address	Primary Telephone	Status	Select		Click the circle beside NEW	
New Record			($\left(\right)$	۲		RECORD and then click GO.	
Campus Address	Jan 01, 2015 to Current Date	DSU Box 3232 Broom 136 Campus Cleveland, Mississippi 38732 United States of America	662-8434546	Active	0			
Permanent/Parent	May 16, 2017 to Current Date	123 Anywhere Street Anywhere, Mississippi 38732 United States of America		Active	0]		
Show All Address	es							

- 7. Under the section heading, **TERMINATE CURRENT CAMPUS ADDRESS**, enter the date to end the current or "old" campus address.
 - Under the section heading, CAMPUS ADDRESS ADD/CHANGE, enter the effective date of the new campus address in the ADDRESS FROM DATE field.
 - o Address Type: CA will default and cannot be change
 - Address Sequence No.: Leave Blank
 - Address Line 1: Enter the new campus address in this format. Do not abbreviate the campus addresses.
 - EXAMPLE: DSU Box 3234 Ewing 190

Or if no DSU Box

Kent Wyatt Hall 247

- Address Line 2: CAMPUS will default, no entry needed
- o City: CLEVELAND will default, no entry needed
- o State: MS will default, no entry needed
- o Zip: 38733 will default, no entry needed
- County: 006 will default, no entry needed
- Nation: 157 will default, no entry needed
- Telephone Type: CA will default, no entry needed
- Area Code: 662 will default, no entry needed
- Telephone Number: Enter the telephone number beginning with the prefix 846. A hypen is not needed
 - EXAMPLE: 8464500

PLEASE SEE EXAMPLE BELOW.

Terminate Current Campus Address



Campus Address Add/Change

Item Current Value	Verr Value	
Address From Date: MM/DD/YYYY*	01/19/2018	Enter the offective date of the new compute address in
Address Type: *(Not Enterable)	CA	the format below
Address Sequence No .:		the format below
Address Line 1: *	DSU Box 3234 Ewing 190	EXAMPLE: 01/19/2018
Address Line 2: *	CAMPUS	
City: *	CLEVELAND	
State: *(Not Enterable)	MS	
ZIP or Postal Code: *	38733	
County: *	006, Bolivar 🗸	
Nation: * (Not Enterable)	157	
Telephone Type: *(Not Enterable)	CA	
Area Code: *	662	
Telephone Number: *	8464500	

8. Routing Queue

Non Academic Affairs:

In the "Routing Queue" section, Human Resources has been defaulted in for all staff campus address changes. No changes are needed

Routing Queue

Approval Level	User Name		Required Action
90 - (HR) Human Resources		Lisa Weeks Giger	Approve
99 - (SUPER) Superuser		Lisa Weeks Giger	Apply
Not Selected ~	Q.		Not Selected v
Not Selected ~	٩,		Not Selected v
Not Selected ~	٩,		Not Selected v
Not Selected ~	٩,		Not Selected ~

Save and Add New Rows

Academic Affairs

j. In the "Routing Queue" section, Academic Affairs and Human Resources has been defaulted in for all faculty campus address changes. No changes are needed.

Routing Queue

Approval Level	User	r Name		Required A	ction
40 - (ACDAFF) Academic Affairs		CBALLARD	Cheryl M Ballard	Approve	
90 - (HR) Human Resources		LGIGER	Lisa Weeks Giger	Approve	
99 - (SUPER) Superuser		LGIGER	Lisa Weeks Giger	Apply	
Not Selected	~ Q			Not Selecte	ed v
Not Selected	~ Q			Not Selecte	ed 🗸
Not Selected	~ Q			Not Selecte	ed 🗸
Not Selected	~ Q			Not Selecte	ed v

Save and Add New Rows

9. Click on the "Save and Add New Rows".

10. Comments

- c. In the "Comments" section, enter comments for the approvers with an explanation for the action.
- d. In the "Comments" section, enter comments for the approvers with an explanation for the action.



11. Save EPAF

- i. Hit the "Save" Button at the bottom of the form.
- j. Return to the top of the form.
- k. The message should display "Your change was saved successfully."
- I. Check your date entry

Electronic Personnel Action Form

Vour change was saved successfully.

Enter the information for the EPAF and either Save or Submit

Name and ID:	Rylie Ann Clark, 900137172		
Transaction:	3969	Query Date:	Dec 18, 2017
Transaction Status:	Waiting	Last Paid Date:	
Approval Category:	Campus Address Change (Non Academic Affairs), D00023		
Save Submit	Delete		

12. Submit EPAF

- a. Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
- b. The EPAF automatically routes to the approvers in the order of their approval levels.

Electronic Personnel Action Form

<	The transaction	has been successfully submitted. ation for the EPAF and either Save or Submit		
	Name and ID:	Rylie Ann Clark, 900137172		
	Transaction:	3969	Query Date:	Dec 18, 2017
	Transaction Status:	Pending	Last Paid Date:	
	Approval Category:	Campus Address Change (Non Academic Affairs), D00023		

Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Delete

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

EPAF APPROVER Accessing the EPAF Menu & Approver Summary

To approve an EPAF you first must log into Employee Self Services.

Accessing EPAF menu in DSU Online Services

To access the EPAF menu, you must have authorization to initiate and/or approve in DSU Online Services. Once you have the appropriate authorizations, you will need to log on to DSU Online Services.

Accessing Employee Self Service through DSU Online Services

Employee Self Service can be accessed through the DSU website:

- 1. Open your internet browser on your computer.
- 2. Click on myDSU.
- 3. Click on Login under DSU online services.
- 4. Click on Login again to gain access to Employee Self Services.



more information



BY INSTRUCTURE Login More Info Canvas is the University's new learning management system (LMS). All online courses and content will be delivered from Canvas beginning June

2013. For additional resources and assistance with Canvas please visit



5. Enter your 900# and password.

HELP EXIT	
Please enter your User Id	dentification Number (ID) and your Password. When finished, select Login.
To protect your privacy, p	lease Exit and close your browser when you are finished.
Note: If you have forgotte	en your password, enter your User ID(UID), then click "Forgot Password?"
User ID: PIN:	
Login Forgot PIN2	

6. Click on Employee Services.

DSU Online services	
Personal Information Alumni and Friends Student and Financial Aid Employed	ze Services
Search Go	SITE MAP HELP EXIT
Welcome, Lisa W. Giger, to the WWW Information System! Last web acc	ess on Oct 14, 2014 at 10:37 am
Student Services & Financial Aid	
Apply for Admission, Register, Viewyour academic records and Financial Aid, F	ay on Account, Apply for Graduation.
🚽 Employee Services	
View your Benefits and Deductions, Txx Information, Job Summary, and Payrol	Information
Personal Information	
View or update your address(es), phone number(s), e-mail address(es), emerge Customize your directory profile.	ency contact information, & mantal status; View name change & social security number change information; Change your PIN;
Numni Services	
View or update interests and activities; Find a classmate; Become a volunteer; U	Update your personal information; Review your pledge history or make a pledge; Customize your directory profile
Return to Homepage	

To approve an EPAF you first go and review the EPAF Approval Summary link. Once at the EPAF menu click on the EPAF Approver Summary link.

Electronic Personnel Action Form

EPAF Approver Summary
EPAF Originator Summary
New EPAF
EPAF Proxy Records
Act as a Proxy
RELEASE: 8.9

The EPAF Approver Summary page has three sections: Current, In My Queue, and History Tabs. The "Current Tab" contains EPAFs that either needs to be approved or acknowledged by the Approver. The "In My Queue" Tab contains EPAFs that will be routed to the Approver in the future. The "History Tab" contains EPAFs that an Approver has previously processed.

	EPAF Approver Summary
C	Current In My Queue History
	Queue Status: All Go

The Current Link:

Displays transactions that with the following statuses:

- **Pending** Transaction is pending approval.
- FYI Transaction is pending acknowledgement.
- More Information Transaction is pending approval but an approver is requesting additional information before they approve it.

To enter the EPAF for any transaction, click on the person's name.

On the "Current Tab" of the EPAF Approver Summary, notice the action column. It has an enterable box that when you click on the box it makes that record selected for approving. In order to approve the EPAF simply click on the save button. To select all of the transaction press the select all button.

Current II	n My Queue History the link under Name to access de	etails of the tr	ansaction.							
Queue S	tatus: All Go Pending Co									
			New EPAF	Update Proxies Search Proxy or Superuser or Fil	ter Transactions					H
				Return to EPAF Menu						
Select A	II Reset Save									
EPAF Tra	ansactions	A 15	A =	1 T (0)	A. 0. 1. 10. 1	A. 54	1. D			
∧ Name		₽ "	 Iransaction 	∠ Type of Change		Effective Date	Required Actio	Action	nks	
Donovan	<u>, Rylee C.</u>	900114402	144	Campus Address Change (Academic Affairs)	Oct 27, 2014	Oct 27, 2014	Approve	0	omments	
Donovan Assista	<u>, Rylee C.</u> int Professor of Art, 000003-00	900114402	142	Job Labor Distribution Change (Academic Affairs)	Oct 27, 2014	Dec 01, 2014	Approve		omments	
Donovan Assista	<u>, Rylee C.</u> int Professor of Art, 000003-00	900114402	54	Salary and Title Change - Staff (Current Position)	Oct 08, 2014	Sep 01, 2014	Approve		omments arnings	
Donovan	, Rylee C.	900114402	48	Campus Address Add/Change - Faculty	Oct 07, 2014	Oct 07, 2014	Approve		omments	Ŧ

The screenshot below illustrates having selected all of the transaction for approval.

3	Select All Reset Save									
ſ	A Name	A ID		A Type of Change	A Submitted Date	▲ Effective Date	A Required Actio	Action	inks	
		₹"	V		V	V				Ξ
	Donovan, Rylee C.	900114402	144	Campus Address Change (Academic Affairs)	Oct 27, 2014	Oct 27, 2014	Approve	V	(omments	
	Donovan, Rylee C. Assistant Professor of Art, 000003-00	900114402	142	Job Labor Distribution Change (Academic Affairs)	Oct 27, 2014	Dec 01, 2014	Approve	•	(omments	
	Donovan, Rylee C. Assistant Professor of Art, 000003-00	900114402	54	Salary and Title Change - Staff (Current Position)	Oct 08, 2014	Sep 01, 2014	Approve	•	omments Varnings	
	Donovan, Rylee C.	900114402	48	Campus Address Add/Change - Faculty	Oct 07, 2014	Oct 07, 2014	Approve	V	omments	
	Giger, Lisa W. Miscellaneous Position-Fund 25, 004025- 00	900325716	111	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Nov 01, 2014	Approve	7	(<u>omments</u> Varnings	
	Giger, Lisa W. HR Workshop III, 004026-00	900325716	110	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Oct 20, 2014	Approve	2	omments (
	Gunn, Jesse C. PT Instructor / Gen Acad Instr, 000458-00	900114407	81	Adjunct New Hire	Oct 13, 2014	Oct 13, 2014	Approve	2	Comments Varnings	
Ì	Hope, Morgan F.	900114408		Terminate Employee Job Only (Academic	Oct 27, 2014	Oct 27, 2014	Approve		omments	Ŧ

Once you save the EPAF you should receive a message indicating that the amount of transactions that were approved. Please make sure that it states that they are processed successfully.

	EPAF Approver Summary
٢	Current In Mv Queue Historv
	Select the link under Name to access details of the transaction.
	Queue Status: All Go

Reviewing Your Work before Approving:

For the purpose of reviewing the detail associated with any of the EPAF, you may click on the name of the individual. The employee's name is underlined in black and indicates that it is a link into the detail information. Notice that is the same as the Comments. Please don't forget to review them especially if there are two asterisks before the word comment (**Comments).

	Select All Reset Save									
2	1 - 25 of 31 Next ♥ Jump to Bottom									
	EPAF Transactions									
	A Name ▼	↓ ID	A Transaction ▼	A Type of Change ▼	▲ Submitted Date	▲ Effective Date ▼	A Required Action ▼	Action	Links	E
	Donovan, Rylee C. Assistant Professor of Art, 000003-00	900114402	54	Salary and Title Change - Staff (Current Position)	Oct 08, 2014	Sep 01, 2014	Approve		<u>Comments</u> <u>Warnings</u>	
	Donovan, Rylee C.	900114402	48	Campus Address Add/Change - Faculty	Oct 07, 2014	Oct 07, 2014	Approve		Comments	
	Giger, Lisa W. Miscellaneous Position-Fund 25, 004025- 00		111	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Nov 01, 2014	Approve		<u>Comments</u> <u>Warnings</u>	
	<u>Giger, Lisa W.</u> HR Workshop III, 004026-00		110	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Oct 20, 2014	Approve		Comments	
	Gunn, Jesse C. PT Instructor / Gen Acad Instr, 000458-00	900114407	81	Adjunct New Hire	Oct 13, 2014	Oct 13, 2014	Approve		<u>**Comments</u> <u>Warnings</u>	
	Hope, Morgan F. Financial Aid Counselor, 000452-00	900114408	143	Terminate Employee Job Only (Academic Affairs)	Oct 27, 2014	Oct 27, 2014	Approve		Comments	
	Hope, Morgan F. Financial Aid Counselor, 000452-00	900114408	86	Employee Termination from DSU (Staff/Hourly)	Oct 16, 2014	Oct 16, 2014	Approve		Comments	-

Once you click on the name link you will see the following:

The Approver has the capability of doing the following for EPAFs that are pending approval:

- Approve To approve a transaction.
- Disapprove To disapprove a transaction.
- Return For Correction To return a transaction to the Originator to make changes. Any transaction that has been returned should have a comment that indicates why it was returned.
- More Info To request additional information from the Originator without returning the transaction for correction. If an
 approver requires more information about a transaction, they should enter a comment that indicates what additional
 information is needed.
- Add Comment To add a comment to the transaction.

Transactions with comments will display as **Comments in the Links section on the EPAF Approver Summary Page.

EPAF Preview
✓ You are acting as an Approver. Name and ID: Rylee Cassandra Donovan, 900114402 Job and Suffix: 000003-00, Assistant Professor of Art Transaction: 54 Query Date: Oct 08, 2014 Transaction Status: Pending Last Paid Date: Approval Category: Salary and Title Change - Staff (Current Position), SALCHS Next ③
Approve Disapprove Return for Correction More Info Add Comment
Here you can see the routing information used to route this EPAF and what action is still pending to be completed. You can see the comments entered by the originator and who the originator is.
Routing Queue Required Action Queue Status Action Date Approval Level Name Required Action Queue Status Action Date Human Resources, 90 Lisa Weeks Giger, LGIGER Approve Pending Superuser, 99 Lisa Weeks Giger, LGIGER Apply In the Queue
Transaction HistoryActionDateUser NameCreated:Oct 08, 2014 Lisa Weeks GigerSubmitted:Oct 08, 2014 Lisa Weeks Giger
When you Return for Correction, the transaction is removed from your current queue but you can see it in your history tab.
Approval Level Name Required Action Queue Status Action Date Human Resources, 90 Lisa Weeks Giger, LGIGER Approve Pending Superuser, 99 Lisa Weeks Giger, LGIGER Apply In the Queue
Transaction History Action Date User Name Created: Oct 08, 2014 Lisa Weeks Giger Submitted: Oct 08, 2014 Lisa Weeks Giger
Approval Types Account Distribution Errors Comments Routing Queue Iransaction History
Next ⊕ Return to Top
Er Ar Approver Summary

In My Queue Link

Displays transactions that with the following statuses:

• In the Queue – Transaction is in the queue of the approver but has not reached the approver's approval level yet.

To enter the EPAF to review the information for any transaction, click on the person's name. The screen shot below shows the current value and the new value. The **new value** column is the column that needs approving.

Enter Changes	Current Va	lue	Nev	w Value									
Jobs Effective Date:	* 08/15/2013	3	09/	01/2014									
Personnel Date: 🙀	08/15/2013	3	09/	01/2014									
Title:	Assistant F	rofessor	of Art Ass	ociate Pro	ofessor of	Art							
Annual Salary:	75000		800	00.00									
FTE:	1		1.0	0									
Job Change Reasor	n:		PR	OMO									
Current													
Effective Date: 10/	01/2014												
COA Index Fund C	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encu	ımbra	nce O	verrid	e Enc
1 10 3	006	61200	0101					100.00					
New													
Effective Date: 10/	08/2014												
COA Index Fund C	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encu	ımbra	nce O	verrid	e Enc
1 10 3	006	61200	0101										
								100.00					

The History Link

Here you can see all the transactions that were processed. The History Link displays transactions with the following statuses:

- **Approved** Transaction that has been an approved by the approver.
- Acknowledged Overridden Transaction that has been approved by a Super User.
- **Applied** Transaction that has been applied to Banner.
- Disapproved Transaction that has been disapproved by an approver in the approval queue.
- Returned for Correction Transaction that has been returned for the correction to the Originator.
- Void Transaction that has been voided.
- **Removed from Queue** Transaction that has been removed from the queue of the approver.

To enter the EPAF to review the information for any transaction, click on the person's name.

Common EPAF Errors

Below contains a list of common errors received when processing EPAFs. This list of errors is not all encompassing. So, if you should come across an error not listed, please contact Human Resources to assist you with resolving the problem.

New EPAF Job Selection Page

- Invalid Position Error
 - Cause Invalid position number entered.
 - Solution Enter a valid position number. If position number is unknown, perform a position search and select the correct valid position number.

Electronic Personnel Action Form Page

- Missing Required Field
 - Cause Did not enter a required field.
 - Solution Enter the New Value in the field indicated in the error message.

Invalid Date Format

- Cause Date is not in the correct MM/DD/YYYY format.
- Solution Format the date in the MM/DD/YYYY format.

Invalid Value

- Cause Non-numeric value entered into a numeric field.
- **Solution** Enter a numeric value.

Primary Job

- Cause Contract Type field is set to Primary and the employee already has a primary job.
- Solution Change the Contract Type field to Secondary or Overload based on the instructions for the EPAF you
 are processes.

Missing User ID in Routing Queue

- Cause User ID has not been entered for each Approval Level in the Routing Queue.
- Solution Enter the User ID for the Approval Level where the Approver is missing in the Routing Queue section. Also, the Originator's Default Routing Queue needs to be updated.