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ELECTRONIC · PERSONNEL · ACTION · FORM (EPAF)

Banner Human Resources Self Service
User Manual

Release 1.3
January 2018

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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.

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.
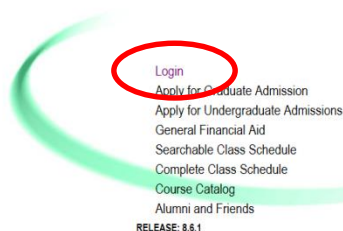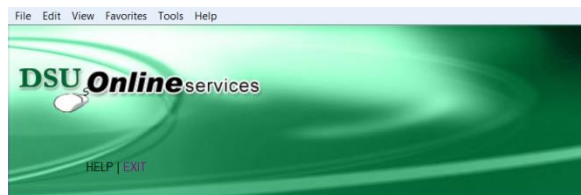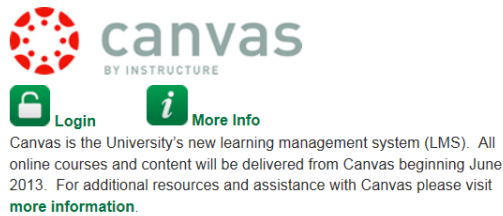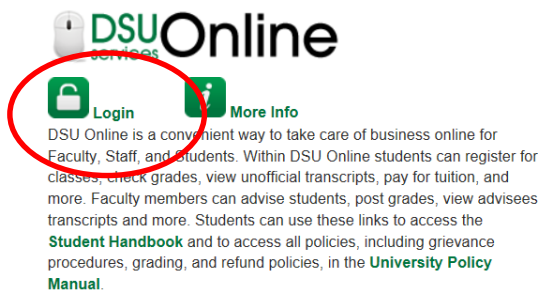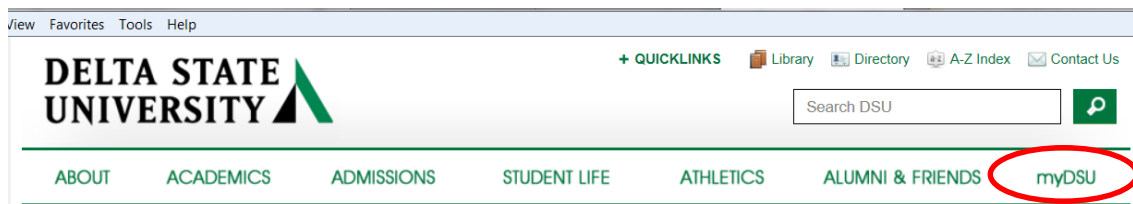
5. Enter your 900# and password.
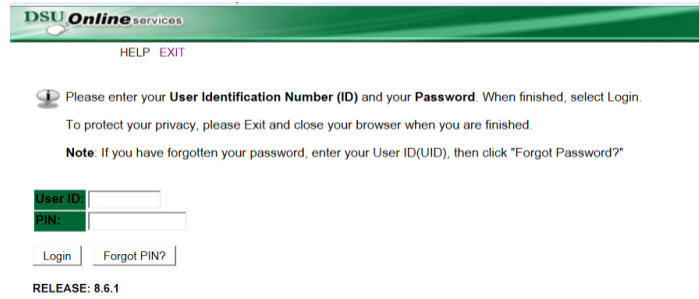
6. Click on Employee Services.
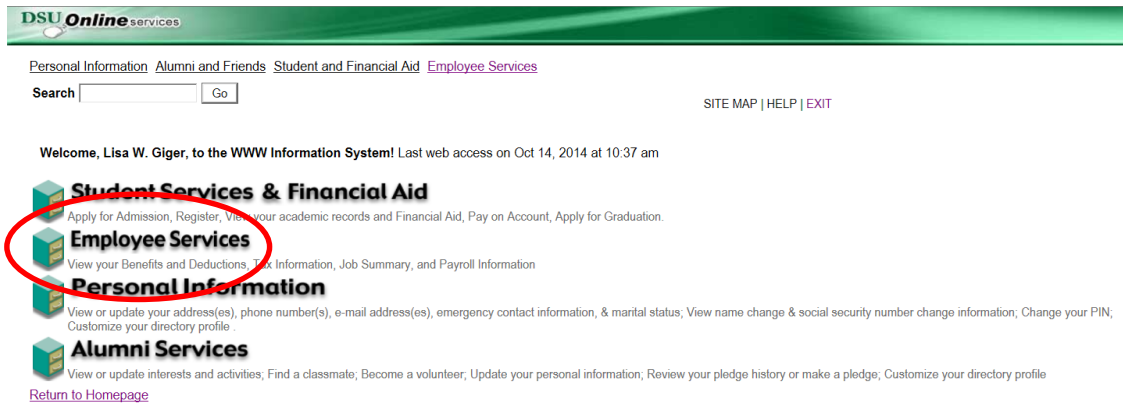
7. Click on Electronic Personnel Action Forms

8. Click on New EPAF

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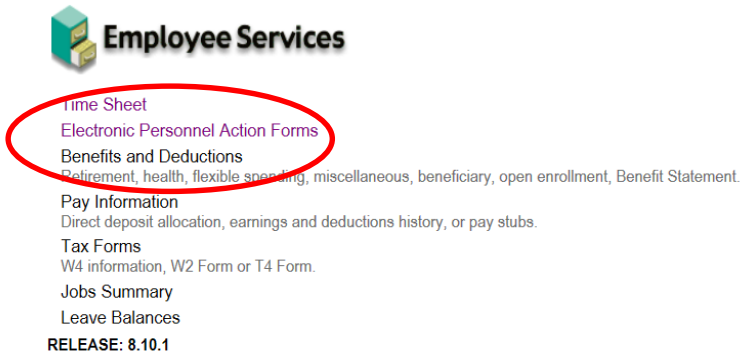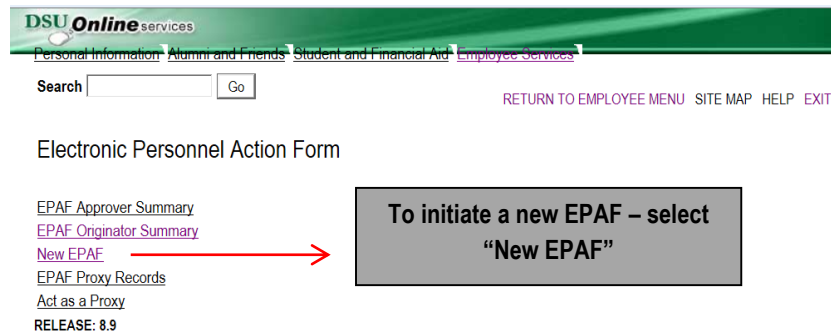
Once you are logged into Employee Services and navigated to select the link to enter a new EPAF you will see the following web page. In this section you will learn to search for the person you want to conduct a transaction on.

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

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 [Go] 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.

Person Search

Check the box to limit the search to an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

Search Criteria

Employee: ☐
Last Name: pagan%
First Name:
Or

ID:
Or

SSN/SIN/TIN:

Records per Page: 25

[Go]

Person Search Results

To choose a person, select a link under ID.

EPAF Person Search

Return to EPAF Menu

Jump to Bottom

ID	Last Name	First Name	Middle Name	Birth Date	Name Type
900044576	Pagan	Muriel	D.		
900098104	Pagan	Juan	Domingo		
900113195	Pagan	Derick	Sean		
900080870	Pagan	Joseph			
900453259	Paganelli	Brenda			
900441794	Pagani	John	C		

Click on the ID field in order to select the employee.

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Return to Top

DSU Online services
Personal Information   Alumni and Friends   Student and Financial Aid   Employee Services
Search [   ] [Go]

RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

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: 900044576   Muriel D. Pagan

Query Date: MM/DD/YYYY   10/16/2014
Approval Category: Not Selected

[Go]

Click on the drop down menu to select the personnel action you want to execute from the Approval Category.

EPAF Originator Summary

Return to EPAF Menu

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.

After identifying an employee, **click the Approval Category drop down menu to select the EPAF** that represents the desired personnel action needed.

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.

DSU EPAFS

#	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 BOTH 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 BOTH 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 BOTH 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 BOTH 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

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	🔍	LGIGER	Lisa Weeks Giger	Approve	
99 - (SUPER) Superuser	🔍	LGIGER	Lisa Weeks Giger	Apply	
5 - (DEPT) Director/Supervisor	▼ 🔍			Not Selected ▼	
Not Selected	▼ 🔍			Not Selected ▼	
Not Selected	▼ 🔍			Not Selected ▼	
Not Selected	▼ 🔍			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.
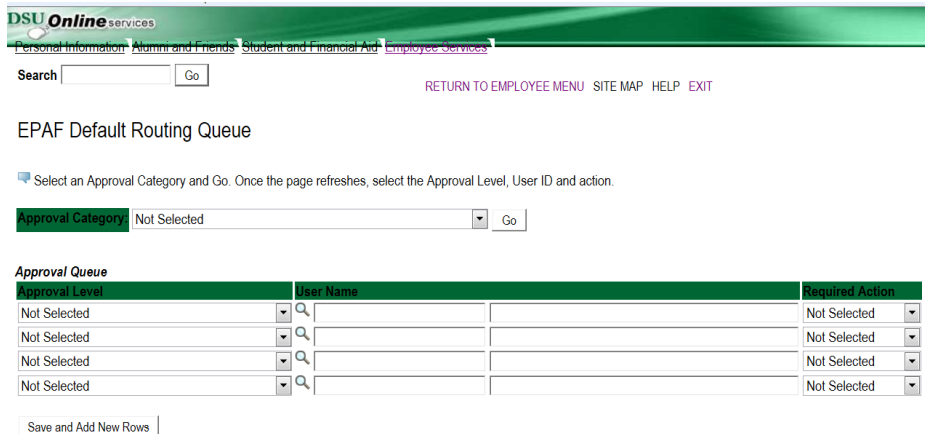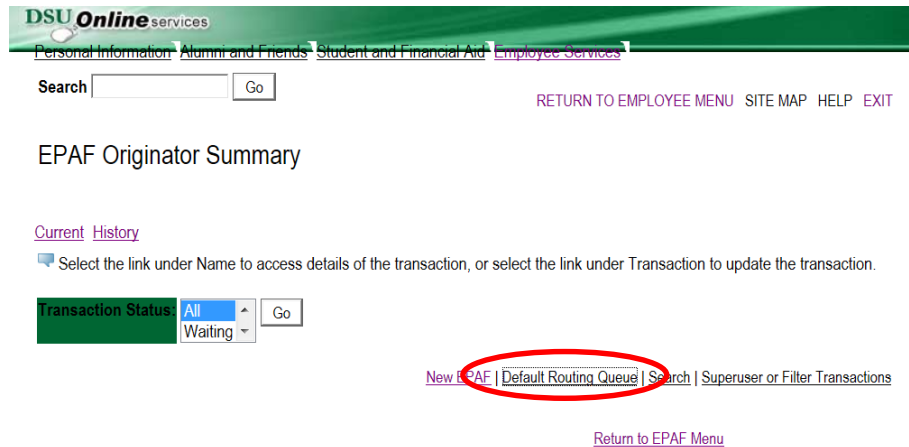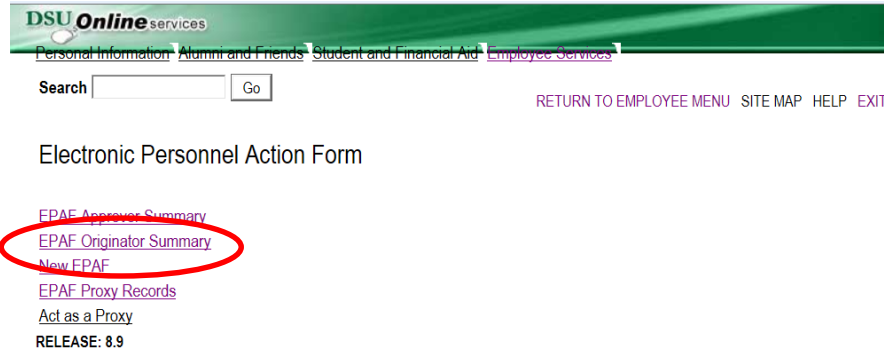
Once at the Default Routing Queue screen, **click the drop down menu and choose an EPAF** to predefine the Approval Queue.

EPAF Default Routing Queue

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

Approval Category: Not Selected ▼ Go

| Not Selected |
| Not Selected |
| Overload Spring - Current Faculty/Staff, OVERSP |
| Overload - Continuing Education Non Credit, CONTOL |
| Adjunct Rehire, AJREHI |
| Adjunct Rehire Non Credit Continuing Education, AJRECE |
| Adjunct New Hire, AJNEWH |
| Adjunct New Hire Continuing Education, AJNEWC |
| Update Labor Distribution - Academic Affairs, LABOR |
| Update Labor Distribution - Non Academic Affairs, LABOR1 |
| Employee Termination from DSU (Staff/Hourly), EMTERM |
| 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), 1PAYOL |
| Campus Address Add/Change - Faculty, CAADCH |
| Campus Address Add/Change - Staff, CAADST |

Approval Queue

Approval Level		Required Action
Not Selected		Not Selected ▼
Not Selected		Not Selected ▼
Not Selected		Not Selected ▼
Not Selected		Not Selected ▼

Save and Add New Ro...

Originator Summary

Return to EPAF Menu

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** 🔍 **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 ▼ Go

Approval Queue

Approval Level		User Name		Required Action	Remove
10 - (CHAIR) Chair ▼	🔍			Approve ▼	☐
15 - (DEAN) Dean ▼	🔍			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 ▼	🔍	BLINDSEY	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 ▼	🔍			Not Selected ▼	
Not Selected ▼	🔍			Not Selected ▼	
Not Selected ▼	🔍 Search			Not Selected ▼	
Not Selected ▼	🔍			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 ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

⁕ - indicates a required field.

ID: ⁕ [   ] [   ] 👤 🔍

Query Date: MM/DD/YYYY ⁕ [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.

Transaction Status: [All / Waiting] [Go]

New EPAF | Default Routing Queue | Search | Superuser or Filter Transactions

Return to EPAF Menu

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Jump to Bottom

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Donovan, Rylee C. Assistant Professor of Art, 000003-00	900114402	19	Update Labor Distribution - Academic Affairs		Oct 01, 2014	Waiting	Comments
Yarbrough, Teresa B. Miscellaneous Position, 004031-00	▆▆▆▆▆	85	One Time Pay (Overload Faculty/Staff)		Oct 01, 2014	Waiting	Comments

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Return to Top
**Comments Exist

New EPAF | Default Routing Queue | Search | Superuser or Filter Transactions

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

✔ You are acting as an Originator.

Name and ID:	Rylee Cassandra Donovan, 900114402	**Job and Suffix:**	000003-00, Assistant Professor of Art
Transaction:	19	**Query Date:**	Oct 01, 2014
Transaction Status:	Waiting	**Last Paid Date:**	
Approval Category:	Update Labor Distribution - Academic Affairs, LABOR		

Next ➔

| Delete | Void | Update | Add Comment |

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

Current

Effective Date: 10/01/2014

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	3006	61200	0101					100.00	

New

Effective Date: 10/01/2014

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	0305	61200	0101					.00	

Routing Queue

Approval Level	Name	Required Action	Queue Status	Action Date
Human Resources, 90	Lisa Weeks Giger, LGIGER	Approve	In the Queue	
Superuser, 99	Lisa Weeks Giger, LGIGER	Apply	In the Queue	

Transaction History

Action	Date	User Name
Created:	Oct 06, 2014	Lisa Weeks Giger
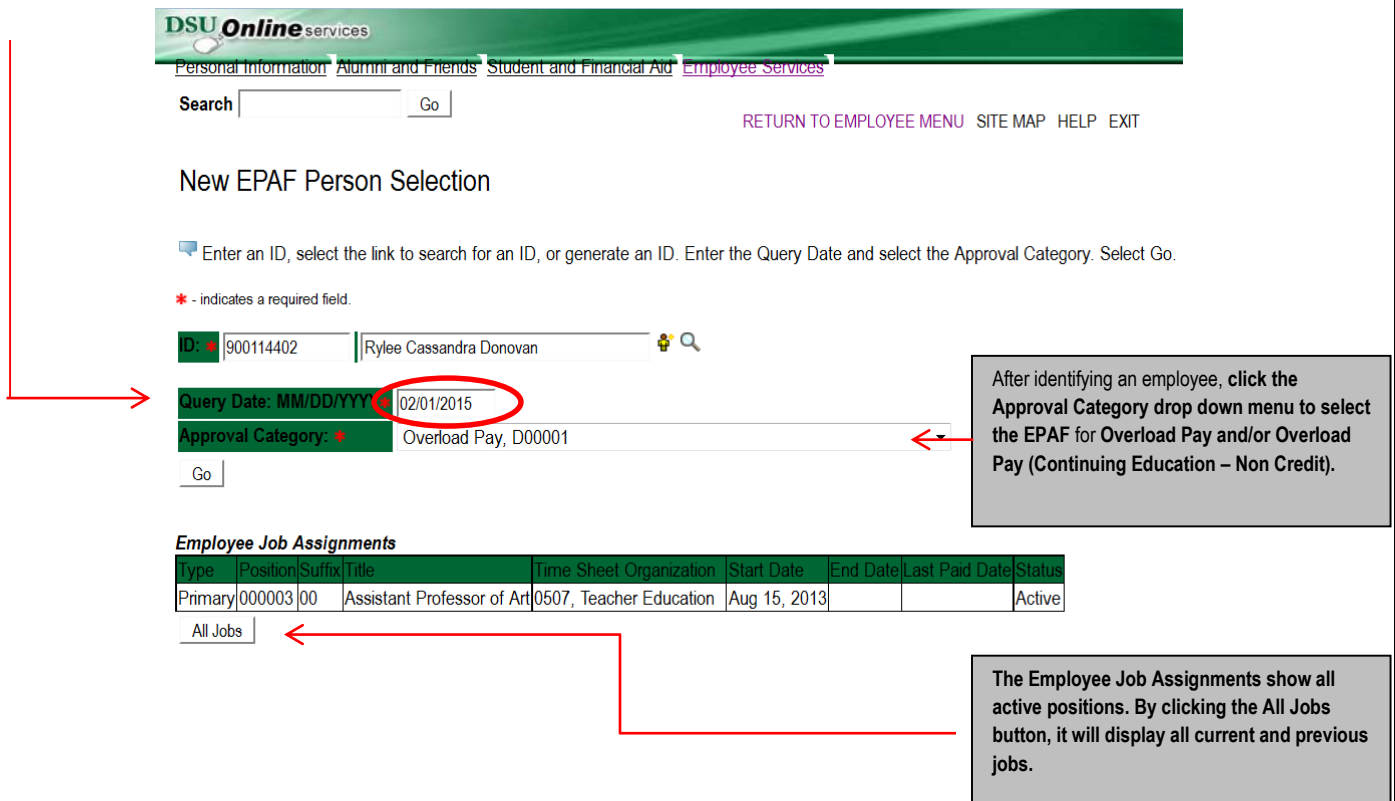
Log into Employee Self Service and choose **ELECTRONIC PERSONNEL ACTION FORMS** and then **NEW EPAF**.

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 🔍 magnifying glass to search for an employee's 900#.
2. The query date will default to today's date. Change the query date to:
   o 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.

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

6. View Employee Class:
   o This section allows the originator to view the current employee's employment information.
   o 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
   o *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

7. Enter Overload Pay Information

Field	Statement/Action	Action/Example
Job Begin Date:	If statement below says "Last Paid Date:"….then → 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	Leave field blank
	If statement below says "PT Instructor/Gen Acad Instr", ….then → Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 PT Instructor / Gen Acad Instr Item / Current Value / New Value Job Begin Date: MM/DD/YYYY	Enter: (enter corresponding year) 09/01/20__ for Fall 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: .25 = 1 course overload .75 = 3 course overload .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	Enter the number FTE for the number of course overloads: 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 Employment Class" is F1, F4, or S1….then → If the employee class under the "View Employee Employment Class" is F2….then → **View Employee Employment Class** Item / Current Value / New Value Employee Class Code: (Not Enterable) F1, Faculty 9/12 Employee Status: (Not Enterable) Active A	Payroll ID M1 should remain defaulted. Use the drop down box to change to M2.
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

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		02/01/2015
Personnel Date: MM/DD/YYYY(Not Enterable)		02/01/2015
Title: *		Overload
Annual Salary: *		
FTE: *		
Contract Type: (Not Enterable)		O
Employee Class Code: *(Not Enterable)		F3
Payroll Id: *		M1, Monthly
Leave Rept Pay ID: *		M1, Monthly
Job Change Reason: (Not Enterable)		OVER
Step: (Not Enterable)		0
Job Status: (Not Enterable)		A

View Employee Employment Class

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

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
Pays: (Not Enterable)		4
Hours per Pay: (Not Enterable)		84

No Action Needed

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

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY *(Not Enterable)		05/31/2015
Job Status: *(Not Enterable)		T
Job Change Reason: *(Not Enterable)		JBEND

No Action Needed

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.
    - o In the "NEW" section – add new rows or make changes to the existing rows.
    - o 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.
    - o 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.
    - o 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"

Enter COA, Fund #, Org#, and Account# and percentage. Be sure percentages = 100%.

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.

Click the remove button on the line that has 0.00% entered. Then click on "Save and Add New Rows.

Update Labor Distributions, 000458-00 PT Instructor / Gen Acad Instr

Current
Effective Date: 02/01/2015

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

New
Effective Date: MM/DD/YYYY 02/01/2015

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		10	3001	61200	0101					30.00		☐
1		340231	3001	61200	0101					70.00		☐
									Total:	100.00		

[Default from Index] [Save and Add New Rows]

---

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, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office**. Other approval levels will default.
    - For Continuing Education courses, add **Dean, Graduate and Continuing Education and Continuing Education (Marilyn Read).**

Approval Queue

Approval Level	User Name		Required Action	Remove
10 - (CHAIR) Chair			Approve	☐
15 - (DEAN) Dean			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	BLINDSEY	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			Not Selected	
Not Selected			Not Selected	
Not Selected	[Search]		Not Selected	
Not Selected			Not Selected	

[Save and Add New Rows]

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

13. **Comments**
    - 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

CRN #: 32330 | Credit Hour: 3 |
Course #: DMI 100 | Course Title:
Intro to Multimedia | Section: 21 |
Enrollment: 5 | Reason for Pay:
Insufficient faculty

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**
    o   Hit the "Save" Button at the bottom of the form.
    o   Return to the top of the form.
    o   The message should display – **"Your change was saved successfully."**
    o   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:	Rylee Cassandra Donovan, 900114402		
Transaction:	15	Query Date:	Oct 03, 2014
Transaction Status:	Waiting		
Approval Category:	Overload Spring 2015 - Current Faculty/Staff, OVERSP		

Save   Submit   Delete

15. **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

✔ The transaction has been successfully submitted.
Enter the information for the EPAF and either Save or Submit

Name and ID:	Rylee Cassandra Donovan, 900114402		
Transaction:	15	Query Date:	Oct 03, 2014
Transaction Status:	Pending		
Approval Category:	Overload Spring 2015 - Current Faculty/Staff, OVERSP		

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

Type	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 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 🔍 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__**
   - 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/YYYY ✱ 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 Paid Date	Status
Secondary	000478	00	Adjunct Instr Teach Ed	0387, Social Science	Feb 01, 2015	May 31, 2015		Active

[All Jobs]

> 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 the Adjunct Rehire and/or Adjunct Rehire (Continuing Education – Non Credit) EPAF.
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 000458 for credit courses and 000478 for Continuing Education – Non Credit courses. The position to be reactivated will usually be the primary type.
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.**

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

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

ID:	Oliva Caden Silver, 900114404
Query Date:	Feb 01, 2015
Approval Category:	Adjunct Faculty Re-Appointment, D00003

Add Employee Job, ADDJOB

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

All Jobs

Next Approval Type   Go

To Re-activate a Position – Screen Shot

New EPAF Job Selection

Enter 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	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									○
	Primary	000458	00	Adjunct Instr Social Scie	0387, Social Science	Sep 01, 2014	Dec 31, 2014		Active	⦿

All Jobs

Next Approval Type   Go

To Activate a Grant Position – Screen Shot

New EPAF Job Selection

Enter 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	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	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	○
	Secondary	000478	00	Adjunct Instr Teach Ed	0387, Social Science	Feb 01, 2015	May 31, 2015		Active	○

All Jobs

Next Approval Type   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 RT=reemployment of PERS retiree	F3
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	
Distribution Orgn:	0387, Social Science	
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	
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 ⟶ 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 Annual Salary: * — 3000 FTE: * — .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	Leave field blank
	To Add Position Number: 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: Fall Semester: 09/01/20__ Spring Semester: 02/01/20__ Add Employee Job, 004030-00 Adjunct Instructors | Item	Current Value	New Value | 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 Title: * — Adjunct Instr Teach Ed Annual Salary: * — 6000.00 FTE: * — .25 Employee Class Code: *(Not Enterable) — F3 Payroll Id: *(Not Enterable) — M2 Leave Rept Pay ID: *(Not Enterable) — M2 Job Change Reason: (Not Enterable) — ADJUN Step: (Not Enterable) — 0 Job Status: (Not Enterable) — A	Enter: (enter corresponding year) 09/01/20__ for Fall 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.	
Contract Type:	Field is defaulted to primary, If error occurs then change contract type to Secondary.	
Title:	Enter title as: Adjunct Instructor in _____. Title may have to be abbreviated	Adj Instr Social Sci
Annual Salary:	Total amount to be paid for course overloads	3000.00
FTE:	FTE for overload is calculated as follows: .25 = 1 course overload .75 = 3 course overload .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	Enter the number FTE for the number of course overloads: 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

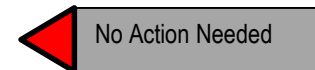| Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	09/01/2014	
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	09/01/2014	02/01/2015
Personnel Date: MM/DD/YYYY(Not Enterable)	09/01/2014	02/01/2015
Contract Type:	Primary	Primary
Title: *	Adjunct Instr Social Scie	Adjunct Instr Social 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
Pays: (Not Enterable)		4
Hours per Pay: (Not Enterable)		84

◄ No Action Needed

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	New Value
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)		05/31/2015
Job Status: *(Not Enterable)		T
Job Change Reason: *(Not Enterable)		JBEND

◄ No Action Needed

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 LIMITED. 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 NOT 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.

Current										
Effective Date: 09/01/2014										
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	3001	61200	0101					100.00	

In most cases the effective date will either be 09/01/20__ or 02/01/20__ The effective date can also be the day after the last paid date. The date cannot be after an employee's last paid.

New										
Effective Date: MM/DD/YYYY 02/01/2015										
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	3001	61200	0101					0.00	

Total: 100.00

Change this percentage to 0.00 and click on Save and Add New Rows.

✔ Defaulting values for Labor Distribution from the Job records.

[Default from Index] [Save and Add New Rows]

Current										
Effective Date: 09/01/2014										
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	3001	61200	0101					100.00	

Screen shot new screen and saving and adding new rows.

New										
Effective Date: MM/DD/YYYY 02/01/2015										
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	3001	61200	0101					0.00	

Total: 100.00

✔ Defaulting values for Labor Distribution from the Job records.

[Default from Index] [Save and Add New Rows]

   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"

Current											
Effective Date: 09/01/2014											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	3001	61200	0101					100.00	

New											
Effective Date: MM/DD/YYYY 02/01/2015											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		10	3001	61200	0101					.00		☐
1		10	3001	61200	0101					20.00		☐
1		340231	0387	61200	0101					80.00		☐
									Total:	100.00	

Default from Index | Save and Add New Rows

> Enter COA, Fund #, Org#, Account# and Percentage. Be sure percentages = 100%.

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.

Current											
Effective Date: 09/01/2014											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	3001	61200	0101					100.00	

New											
Effective Date: MM/DD/YYYY 02/01/2015											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		10	3001	61200	0101					.00		☑
1		10	3001	61200	0101					20.00		☐
1		340231	0387	61200	0101					80.00		☐
									Total:	100.00	

Default from Index | Save and Add New Rows

> Click the remove button on the line that has 0.00% entered. Then click on "Save and Add New Rows.

Current											
Effective Date: 09/01/2014											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	3001	61200	0101					100.00	

New											
Effective Date: MM/DD/YYYY 02/01/2015											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		10	3001	61200	0101					20.00		☐
1		340231	0387	61200	0101					80.00		☐
									Total:	100.00	

Default from Index | Save and Add New Rows

> The Labor Distribution has now been entered and the old one removed.

12. Routing Queue

- o 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.
- o For Grants, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office**. Other approval levels will default.
- o For Continuing Education courses, add **Dean, Graduate and Continuing Education and Continuing Education (Marilyn Read).**

Approval Queue

Approval Level		User Name		Required Action	Remove
10 - (CHAIR) Chair	▾ 🔍			Approve ▾	☐
15 - (DEAN) Dean	▾ 🔍			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	▾ 🔍	BLINDSEY	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	▾ 🔍			Not Selected ▾	
Not Selected	▾ 🔍			Not Selected ▾	
Not Selected	▾ 🔍 Search			Not Selected ▾	
Not Selected	▾ 🔍			Not Selected ▾	

Save and Add New Rows

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

14. Comments

- o 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

CRN #: 32330 | Credit Hour: 3 | Course #: DMI 100 | Course Title: Intro to Multimedia | Section: 21 | Enrollment: 5 | Reason for Pay: Insufficient faculty

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.

15. Save EPAF

- o Hit the "Save" Button at the bottom of the form.
- o Return to the top of the form.
- o The message should display – **"Your change was saved successfully."**
- o 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:	Oliva Caden Silver, 900114404
Transaction:	145 **Query Date:** Feb 01, 2015
Transaction Status:	Waiting
Approval Category:	Adjunct Faculty Re-Appointment, D00003

Save   Submit   Delete

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

✔ The transaction has been successfully submitted.

💬 Enter the information for the EPAF and either Save or Submit

Name and ID:	Oliva Caden Silver, 900114404
Transaction:	145 **Query Date:** Feb 01, 2015
Transaction Status:	Pending
Approval Category:	Adjunct Faculty Re-Appointment, D00003

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

Type	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 🔍 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.

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: 900127333   Rylee Cassandra Donovan   ✿🔍

Query Date: MM/DD/YYYY * 06/01/2016

Approval Category: *   Summer School Overload, D00040

Go

> After identifying an employee, **click the Approval Category drop down menu** to select the EPAF for **Summer School Overload Pay and/or Summer School Overload Pay (Continuing Education – Non Credit).**

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	000201	00	Dir Field Experiences & Profes	0507, Teacher Education	Sep 01, 2013			Active

All Jobs

> **The Employee Job Assignments show all active positions. By clicking the All Jobs button, it will display all current and previous jobs.**

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

- 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

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

ID:	Rylee Cassandra Donovan, 900127333
Query Date:	Jun 01, 2016
Approval Category:	Summer School Overload, D00040

Overload/Add Job, C00006

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job	000468	00	Summer School	1701, Summer School					⦿
	Primary	000201	00	Dir Field Experiences & Profes	0507, Teacher Education	Sep 01, 2013			Active	○

All Jobs

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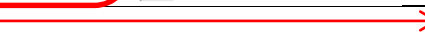
- View Employee Class:
    a. This section allows the originator to view the current employee's employment information.
    b. Employment Status must equal (A) – Active.
    c. If employment status is listed something else other than Active, do not use this EPAF.
    d. *These fields are not able to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

✱ - indicates a required field.

View Employee Employment Class

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

- **Enter Overload Pay Information**

Field	Statement/Action	Action/Example
Job Begin Date:	If the "Current Value" column is populated, then ➡️ **Overload/Add Job, 000468-00 Summer School ii CSP686, Last Paid Date: Jun 26, 2014** 	Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY	05/01/1993	
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	07/30/2014	06/01/2015
Personnel Date: MM/DD/YYYY(Not Enterable)	07/30/2014	05/26/2015
Contract Type: (Not Enterable)	Overload	O
Title: *	Summer School ii CSP686	
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	0
Job Status: (Not Enterable)	Terminated	A		Leave "Job Begin Date" field blank
	If the "Current Value" field is not populated, then, ➡️ **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: *		
Annual Salary: *		
FTE: *		
Employee Class Code: *(Not Enterable)		F3
Payroll Id: *(Not Enterable)		SU
Time Entry Type:		Not Selected
Time Entry Type:		Not Selected
Leave Rept Pay ID: *(Not Enterable)		SU
Job Change Reason: (Not Enterable)		OVER
Step: (Not Enterable)		0
Job Status: (Not Enterable)		A		Enter: (enter corresponding dates) **06/01/2018 or 06/01/20__** – Summer School I **07/01/2018 or 07/01/20__** - for Summer School II
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: **Summer School ART 101** **OR** **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: .25 = 1 course overload .75 = 3 course overload .50 = 2 course overload 1.00 = 4 course overload	Enter the number FTE for the number of course overloads: **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.	

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: *		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

Item	Current Value	New Value
Factor: *(Not Enterable)		1
Pays: *(Not Enterable)		1
Hours per Pay: *(Not Enterable)		84
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)		06/01/2016

No Action Needed

- **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)		T
Job Change Reason: *(Not Enterable)		JBEND

No Action Needed

- **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 Summer School I or 07/01/2017 for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.

Update Default Earnings, 000468-00 Summer School

Current

Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End 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
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				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 Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End 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	84.00			1		
	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.

Update Default Earnings, 000468-00 Summer School II Instructor, Last Paid Date: Jul 30, 2013

Current						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
06/01/2013	SUM, Summer Pay		84.00		1	

New Value							
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY	Remove
06/01/2013	SUM, Summer Pay	84.00			1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		

Enter 06/01/2018 or 07/01/2018 as the new effective date.

✔ Defaulting values for Default Earnings from the Job records.

Save and Add New Rows |

- **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 LIMITED. 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 NOT 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.

Make sure the date listed in the **'EFFECTIVE DATE'** field is:

Summer School I: 06/01/2018
Summer School II: 07/01/2018

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

New											
Effective Date: MM/DD/YYYY 06/01/2016											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
🔍 1		🔍 10	🔍 1701	🔍 61200	🔍 0103	🔍				100.00	
🔍		🔍	🔍	🔍	🔍	🔍					
🔍		🔍	🔍	🔍	🔍	🔍					
🔍		🔍	🔍	🔍	🔍	🔍					
🔍		🔍	🔍	🔍	🔍	🔍					
									Total:	100.00	

✔

Default from Index | Save and Add 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.

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

New											
Effective Date: MM/DD/YYYY 06/01/2016											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
🔍 1		🔍 10	🔍 1701	🔍 61200	🔍 0103	🔍				100.00	
🔍		🔍	🔍	🔍	🔍	🔍					
🔍		🔍	🔍	🔍	🔍	🔍					
🔍		🔍	🔍	🔍	🔍	🔍					
🔍		🔍	🔍	🔍	🔍	🔍					

Total: 100.00

✔

Default from Index | Save and Add New Rows

> The effective date will default to the query date or today's date. This needs to be changed to the following:
>
> Summer School I: 06/01/2018
> Summer School II: 07/01/2018

> Change this percentage to 0.00 and click on Save and Add New Rows.

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

New											
Effective Date: MM/DD/YYYY 06/01/2016											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
🔍 1		🔍 10	🔍 1701	🔍 61200	🔍 0103	🔍				0.00	
🔍		🔍	🔍	🔍	🔍	🔍					
🔍		🔍	🔍	🔍	🔍	🔍					
🔍		🔍	🔍	🔍	🔍	🔍					
🔍		🔍	🔍	🔍	🔍	🔍					

Total: 100.00

✔

Default from Index | Save and Add New Rows

5. Enter the new accounting information. The following must be entered for each line.
   f. COA = enter 1.
   g. Fund No.
   h. Organization No.
   i. Account No. = 61200
   j. Percentage = totals must equal 100%. See sample below

Click to "Save and Add New Rows"

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

New											
Effective Date: MM/DD/YYYY 06/01/2016											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
🔍 1		🔍 10	🔍 1701	🔍 61200	🔍 0103	🔍				0.00	
🔍 1		🔍 10	🔍 1701	🔍 61200	🔍	🔍				25.00	
🔍 1		🔍 340231	🔍 4155	🔍 61200	🔍	🔍				75.00	
🔍		🔍	🔍	🔍	🔍	🔍					
🔍		🔍	🔍	🔍	🔍	🔍					

Total: 100.00

> Enter COA, Fund #, Org#, and Account# and percentage.

✔

Default 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 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

New										
Effective Date: MM/DD/YYYY 06/01/2016										

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		10	1701	61200	0103					.00		☑
1		10	1701	61200	0103					25.00		☐
1		340231	4155	61200	0609					75.00		☐
									Total:	100.00		

Default from Index   Save and Add New Rows

Click the remove button on the line that has 0.00% entered. Then click on "Save and Add New Rows.

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, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office**. Other approval levels will default.
   d. For Continuing Education courses, add **Dean, Graduate and Continuing Education and Continuing Education (Marilyn Read).**

Approval Queue

Approval Level	User Name		Required Action	Remove
10 - (CHAIR) Chair			Approve	☐
15 - (DEAN) Dean			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	BLINDSEY	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			Not Selected	
Not Selected			Not Selected	
Not Selected	Search		Not Selected	
Not Selected			Not Selected	

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

Name and ID:	Rylee Cassandra Donovan, 900127333	
Transaction:	1636	Query Date: Jun 01, 2016
Transaction Status:	Waiting	
Approval Category:	Summer School Overload, D00040	

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.

💬 Enter the information for the EPAF and either Save or Submit

Name and ID:	Rylee Cassandra Donovan, 900127333
Transaction:	1636 **Query Date:** Jun 01, 2016
Transaction Status:	Pending
Approval 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

Type	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.

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 🔍 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.

∗ - indicates a required field.

ID: ∗ 900127334   Olivia Caden Silver   👤🔍

Query Date: MM/DD/YYYY 06/01/2016

Approval Category: ∗ Summer School Adjunct Rehire, D00042

Go

> After identifying an employee, **click the Approval Category drop down menu to select the Summer School 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 Paid Date	Status
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
Secondary	000478	00	Adjunct Instr Teach Ed	0387, Social Science	Feb 01, 2015	May 31, 2015		Terminated

Active Jobs

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.

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.**

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

Overload/Add Job, C00006

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job	000468	00	Summer School	1701, Summer School					⦿
	Primary	000003	00	Assistant Professor of Art	0507, Teacher Education	Aug 15, 2013			Active	○

All Jobs
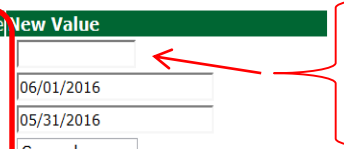
Next Approval Type   Go

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 RT=reemployment of PERS retiree	F3 or RT
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.

Item	Current Value	New Value
Home Organization:	0377, Music	🔍
Distribution Orgn:	0377, Music	🔍
Current Hire Date: MM/DD/YYYY(Not Enterable)	01/01/2016	
Employee Status: *(Not Enterable)	Active	A
Employee Class Code:	F3, Faculty P/T < 9 Months 🔍	
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	Statement/Action	Action/Example
Job Begin Date:	If the "Current Value" column is populated, then ➔ **Overload/Add Job, 000468-00 Summer School ii CSP686, Last Paid Date: Jun 26, 2014** 	Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY	05/01/1993	
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	07/30/2014	06/01/2015
Personnel Date: MM/DD/YYYY(Not Enterable)	07/30/2014	05/26/2015
Contract Type: (Not Enterable)	Overload	O
Title: *	Summer School ii CSP686	
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	0
Job Status: (Not Enterable)	Terminated	A		Leave **"Job Begin Date"** field blank
	If the "Current Value" field is not populated, then, ➔ **Add Employee 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:		Secondary
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)		ADJUN
Step: (Not Enterable)		0
Job Status: (Not Enterable)		A		Enter: (enter corresponding dates) **06/01/2018** – Summer School I **07/01/2018** - for Summer School II
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: **Adjunct Instr in Art**
Annual Salary:	Total amount to be paid for course overloads	**3000.00**
FTE:	FTE for overload is calculated as follows: .25 = 1 course overload .75 = 3 course overload .50 = 2 course overload 1.00 = 4 course overload	Enter the number FTE for the number of course overloads: **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
Hours per Pay: *(Not Enterable)		84
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)		06/01/2016

No Action Needed

- **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)		T
Job Change Reason: *(Not Enterable)		JBEND

No Action Needed

- **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 Summer School I or 07/01/2017 for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.

Update Default Earnings, 000468-00 Summer School

Current						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End 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
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				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 Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End 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	84.00			1		
	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.

Update Default Earnings, 000468-00 Summer School II Instructor, Last Paid Date: Jul 30, 2013

Current						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date
06/01/2013	SUM, Summer Pay		84.00		1	

New Value							
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY	Remove
06/01/2013	SUM, Summer Pay	84.00			1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		

> **Enter 06/01/2018 or 07/01/2018 as the new effective date.**

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

- **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 LIMITED. 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 NOT 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.

> Make sure the date listed in the **'EFFECTIVE DATE'** field is:
>
> Summer School I: 06/01/2018
> Summer School II: 07/01/2018

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

New											
Effective Date: MM/DD/YYYY 06/01/2016											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	1701	61200	0103					100.00	
									Total:	100.00	

✔
Default from Index | Save and Add 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.

> The effective date will default to the query date or today's date. This needs to be change to the following:
>
> Summer School I: 06/01/2018
> Spring Semester: 07/01/2018

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

New											
Effective Date: MM/DD/YYYY 06/01/2016											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	1701	61200	0103					100.00	
									Total:	100.00	

✓

Default from Index | Save and Add New Rows

> Change this percentage to 0.00 and click on Save and Add 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

Current											
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/YYYY 06/01/2016											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	1701	61200	0103					0.00	
1		10	1701	61200						25.00	
1		340231	4155	61200						75.00	
									Total:	100.00	

✓

Default from Index | Save and Add New Rows

> Enter COA, Fund #, Org#, and Account# and percentage. Be sure percentages = 100%.

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.

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	

New												
Effective Date: MM/DD/YYYY 06/01/2016												

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		10	1701	61200	0103					.00		☑
1		10	1701	61200	0103					25.00		☐
1		340231	4155	61200	0609					75.00		☐
										Total:	100.00	

Default from Index | Save and Add New Rows

> **Click the remove button on the line that has 0.00% entered. Then click on "Save and Add 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 **Dean, Graduate and Continuing Education and Continuing Education (Marilyn Read).**

Approval Queue

Approval Level	User Name		Required Action	Remove
10 - (CHAIR) Chair			Approve	☐
15 - (DEAN) Dean			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	BLINDSEY	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			Not Selected	
Not Selected			Not Selected	
Not Selected	Search		Not Selected	
Not Selected			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 EPAF 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	

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
Transaction Status:	Pending
Approval Category:	Summer School Adjunct Rehire, D00042

Query Date: Jun 01, 2016

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 🔍 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 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

3. 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 = *any departments that do not report to the Provost*, but report to other Vice Presidents/Directors. This EPAF is used for payments by departments that do not report to the Provost.

    Academic Affairs = *departments that report to the Provost*. 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.

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	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job	004026	00	Miscellaneous Position Fund 25	41211, Other General Institutional					●
	Primary	000921	00	Assistant Director	4113, Human Resource	Oct 01, 2015			Active	○

[All Jobs]

[Next Approval Type] [Go]

6. View Employee Class:
   o This section allows the originator to view the current employee's employment information.
   o 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
   o *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
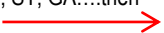
View Employee Employment Class

Item	Current Value	New Value
Employee Class Code: (Not Enterable)	S1, Full Time Staff	
Employee Status: *(Not Enterable)	Active	A

The Employee Class Code will most of the time tell you which payroll ID to use from the table above when 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 100, Last Paid Date: May 31, 2014	
	Item / Current Value / New Value — Job Begin Date: MM/DD/YYYY	
	If there is no current values in the "Current Value" fields,……then	Enter: (enter corresponding year) 01/01/2018 or 02/01/2018 or 03/01/2018 MM/01/20__
	Overload/Add Job, 004026-00 Miscellaneous Position Fund 25	
	Item / Current Value / New Value — Job Begin Date: MM/DD/YYYY	
Job Effective Date:	Enter the first day of the month for which the one-time payment – extra services are to be paid	01/01/2018 or 02/01/2018 or 03/01/2018 MM/01/20__
Job Personnel Date:	Enter the first day of the month for which the one-time payment – extra services are to be paid. This date should match the "Job Effective Date"	01/01/2018 or 02/01/2018 or 03/01/2018 MM/01/20__
Contract Type:	This field defaults to "Overload". Field may be changed to either Primary or Secondary.	
Title:	Enter the description of the one time payment – extra services performed Overload/Add Job, 004026-00 Miscellaneous Position Fund 25 Item / Current Value / New Value — Job Begin Date: MM/DD/YYYY 11/01/2015; Jobs Effective Date: MM/DD/YYYY 11/01/2015; Personnel Date: MM/DD/YYYY 11/01/2015; Contract Type: Overload; Title: * Basketball Ticket Worker	Example: Basketball Ticket Worker First Year Seminar Instructor (used pos 001202 00)
Annual Salary:	Total amount to be paid for one time payments – extra services	100.00
FTE:	FTE for one time payments – extra services are generally 0.00	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 Employment Class" is S1, S4, F1, or F4, or ….then	Use the drop down box to change to M1.

	If the employee class under the "View Employee Employment Class" is S2, F2, F3, ST, GA….then	Payroll ID should ramain defaulted to M2.
	If the employee class under the "View Employee Employment Class" is RT, TE, S3…then the payroll ID will be determined based on previous job assignments.	Payroll ID will either be M1 or M2 based on previous job assignments.

View Employee Employment Class

Item	Current Value	New Value
Employee Class Code: (Not Enterable)	S1, Full Time Staff	
Employee Status: *(Not Enterable)	Active	A

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/Add Job, 004026-00 Miscellaneous Position Fund 25

Item	Current Value	New 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
Title: *		Basketball Ticket Worker
Annual Salary: *		50.00
FTE: *		
Employee Class Code: *		S3
Payroll Id: *		M1, Monthly
Time Entry Type: (Not Enterable)		P
Time Entry Type: (Not Enterable)		N
Leave Rept Pay ID: *		M1, Monthly
Job Change Reason: (Not Enterable)		ONE
Step: (Not Enterable)		0
Job Status: (Not Enterable)		A

View Employee Employment Class

Item	Current Value	New Value
Employee Class Code: (Not Enterable)	S1, Full Time Staff	
Employee Status: *(Not Enterable)	Active	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

Item	Current Value	New Value
Factor: *		1
Pays: *		1
Hours per Pay: *(Not Enterable)		84.00
Jobs Effective Date: MM/DD/YYYY*		11/01/2015

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 the month in which the one - time payment will be issued in the "NEW VALUE EFFECTIVE DATE" field. MM/01/20__, EX. 06/01/2017

Update Default Earnings, 004026-00 Miscellaneous Position Fund 25

Current						
Effective Date	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End 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
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		

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	Shift	End 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
11/01/2015	REG, Regular Pay	84.00			1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		

Save and Add New Rows

If the fields are populated under the **"CURRENT EFFECTIVE DATE"** as shown below, then under the **"NEW VALUE EFFECTIVE DATE"**, enter the 1st day of the month in which the payment is to be paid. MM/01/20__ **EXAMPLE: 02/01/2018**

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 Date
07/01/2014	REG, Regular Pay	84.00			1	

New Value							
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY	Remove
07/01/2014	REG, Regular Pay	84.00			1		
	Not Selected						
	Not Selected						
	Not Selected				1		
	Not Selected				1		

Enter the 1st day of the month in which the payment is to be paid: EXAMPLE: 02/01/2018

✔ Defaulting values for Default Earnings from the Job records.

Save and Add New Rows

EXAMPLE OF THE DEFAULT EARNINGS SCREEN WITH THE UPDATED DATE

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 Date
07/01/2014	REG, Regular Pay	84.00			1	

New Value							
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours	Special Rate	Shift	End Date MM/DD/YYYY	Remove
11/01/2015	REG, Regular Pay	84.00			1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		
	Not Selected				1		

✔ 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

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY *		11/30/2015
Job Status: *(Not Enterable)		T
Job Change Reason: *(Not Enterable)		JBEND

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.

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

Current											
Effective Date: 11/01/2015											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date

New												
Effective Date: MM/DD/YYYY 11/01/2015												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		108601	41211	61300	0605					.00		
1		108522	4021	61300						100		
									Total:	.00		

Default from Index   Save and Add New Rows

Enter COA, Fund #, Org#, and Account# and percentage.
Be sure percentages = 100%.

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												
Effective Date: MM/DD/YYYY 11/01/2015												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		108601	41211	61300	0605					.00		☑
1		108522	4021	61300						100		
									Total:	.00		

Default from Index   Save and Add New Rows

Click the remove button on the line that has 0.00% entered. Then click on "Save and Add New Rows.

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												
Effective Date: MM/DD/YYYY 11/01/2015												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
🔍 1		🔍 108522	🔍 4021	🔍 61300	🔍 0501	🔍				100.00		☐
🔍		🔍	🔍	🔍	🔍	🔍						
🔍		🔍	🔍	🔍	🔍	🔍						
🔍		🔍	🔍	🔍	🔍	🔍						
🔍		🔍	🔍	🔍	🔍	🔍						

Search   Total: 100.00

Default from Index   Save and Add 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, **all EPAFS must have a Director, Vice President, Grants, and Grants Budget Office**. 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, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office**. Other approval levels will default.
   h. For Academic One-Time Payment – Extra Services Continuing Education, add **Dean, Graduate and Continuing Education 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.

Comment

Enter additional information here.

Comment

Basketball Ticket Worker: Worked on 10-23-2015, 10-25-2015

EXAMPLE of what a comment might contain.

8. **Save EPAF**
   b. Hit the "Save" Button at the bottom of the form.
   c. Return to the top of the form.
   d. The message should display – **"Your change was saved successfully."**
   e. 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:	Rylee Olivia Donovan, 900124058	Query Date:	Nov 01, 2015
Transaction:	876		
Transaction Status:	Waiting		
Approval Category:	One Time Payment - Extra Services (Non Academic Affairs), D00007		

Save Submit Delete

9. **Submit EPAF**
   f. Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
   g. 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:	Rylee Olivia Donovan, 900124058
Transaction:	876
Transaction Status:	Pending
Approval Category:	One Time Payment - Extra Services (Non Academic Affairs), D00007

Query Date: Nov 01, 2015

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

Type	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 all you to start over.

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 🔍 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 = _any departments that do not report to the Provost_, 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 = _departments that report to the Provost_. 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.**
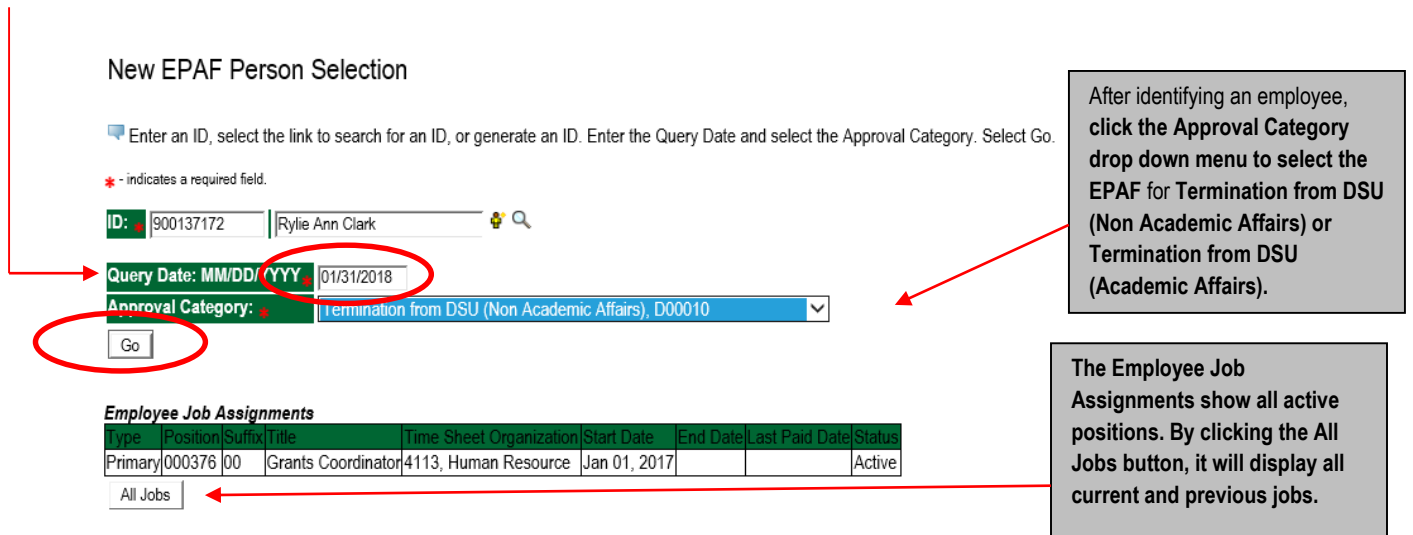
TERMINATION/RESIGNATION PROCESS FOR INDIVIDUALS WHO ARE CLASSIFIED AS 12 MONTH EMPLOYEES.
Use for both Monthly & Bi-Weekly employees

!!! 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.

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 * 01/31/2018

Approval Category: * Termination from DSU (Non Academic Affairs), D00010 ▾

[Go]

After identifying an employee, **click the Approval Category drop down menu to select the EPAF for Termination from DSU (Non Academic Affairs) or Termination from DSU (Academic Affairs).**

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]

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

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									○
	Primary	000376	00	Grants Coordinator	4113, Human Resource	Jan 01, 2017			Active	◉

[All Jobs]

[Go]

> **Find the primary job and click the radial button at the end of the job to select the job and click GO.**

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

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY ✱	01/01/2017	01/31/2018
Job Status: ✱(Not Enterable)	Active	T
Job Change Reason: ✱(Not Enterable)		TERM

Terminate Employee from DSU

Item	Current Value	New Value
Last Work Date: MM/DD/YYYY ✱		01/26/2018
Term Reason Code: ✱		V, Voluntary
Termination Date: MM/DD/YYYY ✱		01/31/2018

> **In the Jobs Effective Date Field, enter the date the employee is to receive pay through**

> **In the Last Work Date Field, enter the last date the employee was physically at work.**

> **In the Term Reason Code, select the reason from the drop down box for Termination/Resignation**

> **In the Termination Date field, enter the last day the employee is to be paid for.**

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, **all EPAFS must have a Director, Vice President, Grants, and Grants Budget Office,** 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)
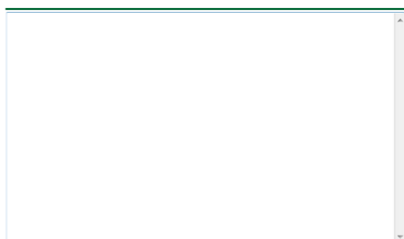
Academic Affairs

    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, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office,** 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

Enter additional information here.

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	**Job and Suffix:**	000376-00, Grants Coordinator
Transaction:	4009	**Query Date:**	Jan 31, 2018
Transaction Status:	Waiting	**Last Paid Date:**	
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.

Search [   ] Go

RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

Electronic Personnel Action Form

✔ The transaction has been successfully submitted.
   Enter the information for the EPAF and either Save or Submit

Name and ID:	Rylie Ann Clark, 900137172	**Job and Suffix:**	000376-00, Grants Coordinator
Transaction:	4010	**Query Date:**	Jan 31, 2018
Transaction Status:	Pending	**Last Paid Date:**	
Approval Category:	Termination from DSU (Non Academic Affairs), D00010		

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.

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 Class

Item	Current Value	New Value
Employee Class Code: (Not Enterable)	F1, Faculty 9/12	
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	T
Job Change Reason: *(Not Enterable)	PROMO	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*		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 Paid Date: Jan 31, 2017**

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	09/01/2015	05/31/2018
Job Status: *(Not Enterable)	Active	T
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

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 🔍 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 = *any departments that do not report to the Provost*, 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 = *departments that report to the Provost*. This EPAF is used for changes to faculty/staff positions in departments/divisions that report directly to the provost.

<p style="text-align:center;color:red;">**!!! IMPORTANT !!!**</p>

<p style="color:red;">**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.**</p>

💬 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 * 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

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

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.**

💬 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	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									⦿
	Primary	000376	00	Grants Coordinator	4113, Human Resource	Jan 01, 2017			Active	◯

[All Jobs]
([Go])

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.
7. 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

Current
Effective Date: 01/01/2017

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override En
1		10	4113	61300	0605					100.00	

New
Effective Date: MM/DD/YYYY 06/01/2017

> 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.
> **EXAMPLE: 02/01/2018**

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
🔍 1	🔍	🔍 10	🔍 4113	🔍 61300	🔍 0605	🔍				100.00	
🔍	🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍	🔍					
🔍	🔍	🔍	🔍	🔍	🔍	🔍			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

New

Effective Date: MM/DD/YYYY 06/01/2017

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		10	4113	61300	0605					75.00		☐
1		340231	4113	61300	0605					25.00		☐

Total: 100.00

Default from Index | Save and Add New Rows

New

Effective Date: MM/DD/YYYY 06/01/2017

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		340231	4113	61300	0605					100.00		☐

Total: 100.00

Default from Index | Save and Add New Rows

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. **All EPAFs must have a Director and Vice President level approval.**

g. Grants One-Time Payment – Extra Services, **all EPAFS must have a Director, Vice President, Grants, and Grants Budget Office**. 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, **all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office**. Other approval levels will default.

 h. For Academic One-Time Payment – Extra Services Continuing Education, add **Dean, Graduate and Continuing Education 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**
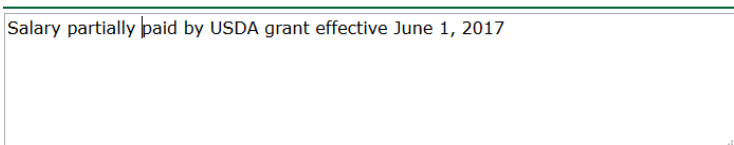
 b. In the "Comments" section, enter comments for the approvers with an explanation for the action.

Comment

Enter additional information here.

Comment

Salary partially paid by USDA grant effective June 1, 2017

EXAMPLE of what a comment might contain.

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

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	Job and Suffix:	000376-00, Grants Coordinator
Transaction:	3789	Query Date:	Jun 01, 2017
Transaction Status:	Waiting	Last Paid Date:	
Approval Category:	Job Labor Distribution Change (Non Academic Affairs), D00016		

Save | Submit | Delete

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

✔ The transaction has been successfully submitted.
💬 Enter the information for the EPAF and either Save or Submit

Name and ID:	Rylie Ann Clark, 900137172	Job and Suffix:	000376-00, Grants Coordinator
Transaction:	3790	Query Date:	Jun 01, 2017
Transaction Status:	Pending	Last Paid Date:	
Approval Category:	Job Labor Distribution Change (Non Academic Affairs), D00016		

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.

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 🔍 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 = _any departments that do not report to the Provost_, but report to other Vice Presidents/Directors. This EPAF is used for changes to positions in departments that do not report to the Provost. **This EPAF is used for also for Academic Affairs staff positions.**

   Academic Affairs = _departments that report to the Provost_. This EPAF is used for campus address changes to **FACULTY** positions **ONLY** 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   ⌄]

[Go]

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 Summary

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.

RELEASE: 8.9.0.3

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

Type	From and To Date	Address	Status	Select
New Record				○
Campus Address	Jan 01, 2015 to Current Date	DSU Box 3232 Broom 136 Campus Cleveland, Mississippi 38732 United States of America	Active	◉

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

Show All Addresses

Next Approval Type

> Click the circle beside the current campus address and click 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

Type	From and To Date	Address	Primary Telephone	Status	Select
New Record					◉
Campus Address	Jan 01, 2015 to Current Date	DSU Box 3232 Broom 136 Campus Cleveland, Mississippi 38732 United States of America	662-8434546	Active	○
Permanent/Parent	May 16, 2017 to Current Date	123 Anywhere Street Anywhere, Mississippi 38732 United States of America		Active	○

Show All Addresses

Go

> Click the circle beside NEW RECORD and then click GO.

7. Under the section heading, **TERMINATE CURRENT CAMPUS ADDRESS**, enter the date to end the current or "old" campus address.
   o 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
   o Address Sequence No.: Leave Blank
   o 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
   o 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
   o County: 006 will default, no entry needed
   o Nation: 157 will default, no entry needed
   o Telephone Type: CA will default, no entry needed
   o Area Code: 662 will default, no entry needed
   o 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

Item	Current Value	New Value
Address To Date: MM/DD/YYYY ✱		01/18/2018
Address Type: (Not Enterable)	CA, Campus Address	CA
Address Sequence No.: ✱	2	2

Enter the end date of the current campus address in the format below

EXAMPLE: 01/18/2018

Campus Address Add/Change

Item	Current Value	New Value
Address From Date: MM/DD/YYYY ✱		01/19/2018
Address Type: ✱(Not Enterable)		CA
Address Sequence No.:		
Address Line 1: ✱		DSU Box 3234 Ewing 190
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

Enter the effective date of the new campus address in the format below

EXAMPLE: 01/19/2018

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	🔍 LGIGER	Lisa Weeks Giger	Approve
99 - (SUPER) Superuser	🔍 LGIGER	Lisa Weeks Giger	Apply
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected
Not Selected	🔍		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 Name		Required Action
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	🔍		Not Selected
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected

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.

Comment

Enter additional information here.

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."**
     l.   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		
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.
💬 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:	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.

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.

5. Enter your 900# and password.

6. Click on Employee Services.

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

Current In My Queue History
💬 Select the link under Name to access details of the transaction.

Queue Status: [All / Pending] 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.**

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

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

Current In My Queue History

✔ 2 transaction(s) processed successfully.
Select the link under Name to access details of the transaction.

Queue Status: [All / Pending ▲▼] [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]

1 - 25 of 31 Next ➡
Jump to Bottom

EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action	Links
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	☐	Comments Warnings
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	☐	Comments Warnings
Giger, Lisa W. 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	☐	**Comments Warnings
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 ➡

[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

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

When you Return for Correction, the transaction is removed from your current queue but you can see it in your history tab.

Routing Queue

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 | Transaction History

[Approve] [Disapprove] [Return for Correction] [More Info]   Add Comment
Next ➡
Return to Top

EPAF 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.

Salary and Title Change/Current Position - Staff, 000003-00 Assistant Professor of Art

Enter Changes	Current Value	New Value
Jobs Effective Date: ✱	08/15/2013	09/01/2014
Personnel Date: ✱	08/15/2013	09/01/2014
Title:	Assistant Professor of Art	Associate Professor of Art
Annual Salary:	75000	80000.00
FTE:	1	1.00
Job Change Reason:		PROMO

Current

Effective Date: 10/01/2014

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	3006	61200	0101					100.00	

New

Effective Date: 10/08/2014

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
1		10	3006	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.