DELTA STATE UNIVERSITY

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ELECTRONIC · PERSONNEL · ACTION · FORM (EPAF)

Banner Human Resources Self Service
Student User Manual

Release 1.0
August 2021

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INTRODUCTION

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

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

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

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

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.

Enter your username and password and click sign-in.

4. You may be asked to verify additional security verification. Enter the appropriate response.
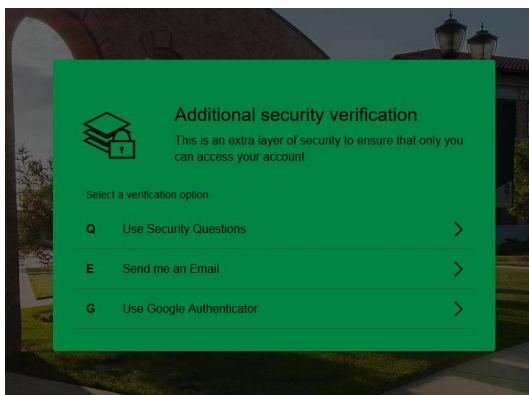
5. Click on Employee Services.
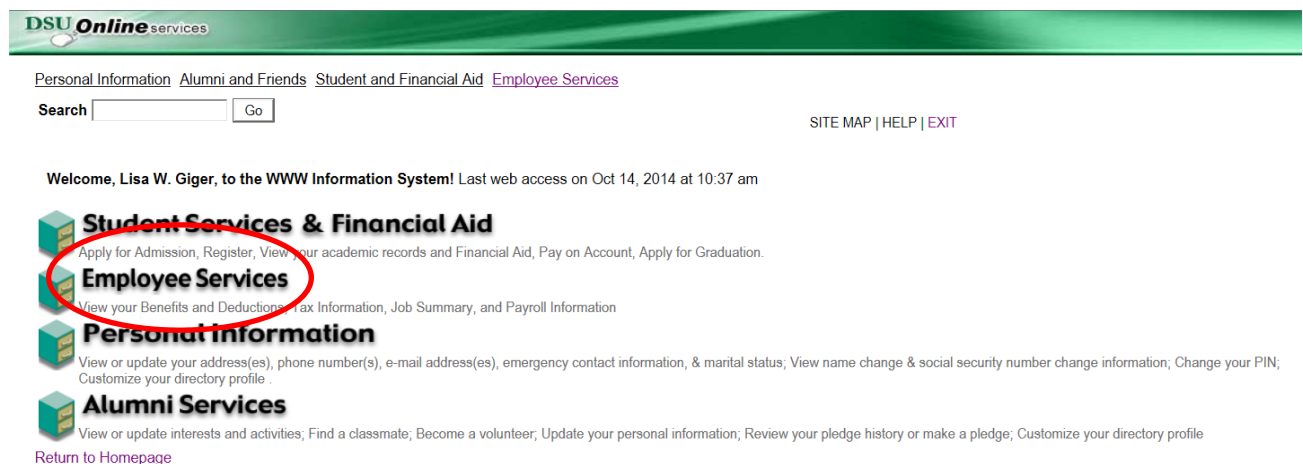
6. Click on Electronic Personnel Action Forms

Employee Services

Time Sheet
Electronic Personnel Action Forms
Benefits and Deductions
Retirement, health, flexible spending, miscellaneous, beneficiary, open enrollment, Benefit Statement.
Pay Information
Direct deposit allocation, earnings and deductions history, or pay stubs.
Tax Forms
W4 information, W2 Form or T4 Form.
Jobs Summary
Leave Balances
RELEASE: 8.10.1

7. Click on New EPAF

DSU Online services

Personal Information   Alumni and Friends   Student and Financial Aid   Employee Services

Search [   ] Go

RETURN TO EMPLOYEE MENU   SITE MAP   HELP   EXIT

Electronic Personnel Action Form
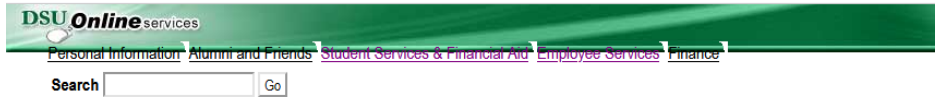
EPAF Approver Summary
EPAF Originator Summary
New EPAF ←———— **To initiate a new EPAF – select "New EPAF"**
EPAF Proxy Records
Act as a Proxy
RELEASE: 8.9

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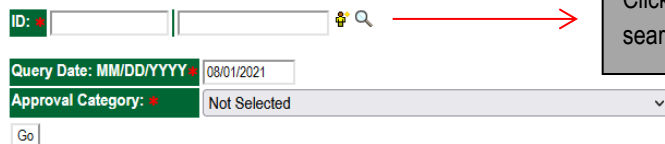
When you do not know the 900 number you can search for it by pressing the magnifying glass icon next to the ID field.

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:	giger%
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.

Jump to Bottom

▲ ID ▼	▲ Last Name ▼	▲ First Name ▼	Middle Name
███	Giger	Ann	
███	Giger	Lisa	Weeks
███	Giger	Dennis	Wayne
███	Giger	Charles	F
███	Giger	Barbara	F
███	Giger	Jason	C
███	Giger	Daniel	Wayne
███	Giger	Phillip	L
███	Giger	Aaron	Brett
███	Giger	Jared	Avery
███	Giger	Christoper	Allen

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Return to Top

Person Search Results

To choose a person, select a link under ID.

Jump to Bottom

ID	Last Name	First Name	
	Giger	Ann	
	Giger	Lisa	Weeks
	Giger	Dennis	Wayne
	Giger	Charles	F
	Giger	Barbara	F
	Giger	Jason	C
	Giger	Daniel	Wayne
	Giger	Phillip	L
	Giger	Aaron	Brett
	Giger	Jared	Avery
	Giger	Christoper	Allen

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

1 - 11 of 11
Return to Top

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.

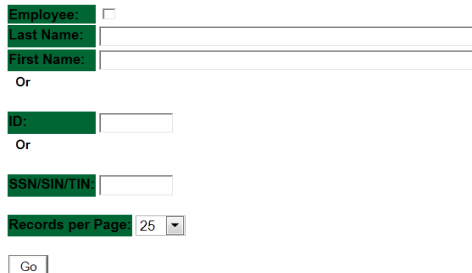***** - indicates a required field.

ID: * [   ] Lisa Weeks Giger

Query Date: MM/DD/YYYY * 08/02/2021

Approval Category: * [Not Selected ▾]

[Go]

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

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.

DSU *Online* services

Personal Information | Alumni

Search [   ]

New EPAF Person S

| Campus Address Change (Academic Affairs), D00022 |
| Campus Address Change (Non Academic Affairs), D00023 |
| Title and/or Salary Adjustment (Academic Affairs), D00011 |
| Title and/or Salary Adjustment (Non Academic Affairs), D00012 |
| Hourly Title and/or Rate Adjustment (Academic Affairs), D00013 |
| Hourly Title and/or Rate Adjustment (Non Academic Affairs), D00014 |
| Hire/Rehire WSR Student Employee, D00052 |
| Hire/Rehire RSE Student Employee, D00053 |
| Termination of WSR Student Position, D00054 |
| Termination of RSE Student Position, D00055 |
| Hourly Rate Change for WSR Employee, D00056 |
| Hourly Rate Change for RSE Employee, D00057 |

💬 Enter an ID, select the link   e Approval Category. Select Go.

✱ - indicates a required field.

ID: ✱ [■■■■■■] ‖Lisa V

Query Date: MM/DD/YYYY ✱

Approval Category: ✱ Not Selected

[Go]

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

EPAF Approver Summary | EPAF Originator Summary

Return to EPAF Menu

RELEASE: 8.18

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: ✱ [■■■■■■] [Lisa Weeks Giger] 👤 🔍 ⟵

Query Date: MM/DD/YYYY ✱ [08/02/2021] ⟵

Approval Category: ✱ [Hire/Rehire WSR Student Employee, D00052 ▾] ⟵

[Go]

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	D00052	Hire/Rehire WSR Student Employee	To hire and/or rehire a WSR student employee. For new student hires, additional documentation must be received before processing this EPAF.	Human Resources
2	D00053	Hire/Rehire RSE Student Employee	To hire and/or rehire a RSE student employee. For new student hires, additional documentation must be received before processing this EPAF.	Human Resources
3	D00054	Termination of a WSR Student Position	To remove a WSR student employee from payroll during the calendar year.	Human Resources
4	D00055	Termination of a WSR Student Position	To remove a RSE student employee from payroll during the calendar year.	Human Resources
5	D00056	Hourly Rate Change for WSR employee	To change the hourly rate for a WSR student employee.	Human Resources
6	D00057	Hourly Rate Change for RSE employee	To change the hourly rate for a WSR student employee.	Human Resources
7	D00058	Labor Distribution for WSR Student Employee	To change the labor distribution for a WSR student employee	Human Resources
8	D00059	Labor Distribution for RSE Student Employee	To change the labor distribution for a RSE student employee	Human Resources

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.

In Banner, use the form **NTRROUT**, to enter the default routing queue for the student EPAFs. Your user ID should default to your name. See screenshot below.

Enter the corresponding EPAF Approval Category and enter the default routing queue for each. Click on to begin entering routing queue.

D00052 – Hire/Rehire WSR Student Employee   D00055 – Termination of RSE Student Position
D00053 – Hire/Rehire RSE Student Employee   D00056 – Hourly Rate Change WSR Employee
D00054 – Termination of WSR Student Position   D00057 – Hourly Rate Change of RSE Employee

Below is the screenshot of **D00052 (Hire/Rehire of WSR Student Employee)** and the appropriate actions required. Enter the appropriate supervisor's name for STSUP1 and if applicable for STSUP2. If there is not a second supervisor, then enter the username STSUP1. Enter your user name as the ORIGFY. This will notify you once the EPAF has been processed.

Click on the **SAVE** button on the lower right corner or hit F10 on your keyboard to commit your changes.

The same routing queue will be used for **D00052, D00054 and D00056.**

Level Code	Level	User ID	User ID Name	Required Action *
STSUP1	81			Approval
STSUP2	82			FYI
FINAID	83	LBOULANGER	Mrs. Lauren Boulanger	Approval
STUDHR	84	SMPHILLIPS	Ms Samantha Myers Phillips	Approval
ORIGFY	85			FYI
STAPPL	86	SMPHILLIPS	Ms Samantha Myers Phillips	Apply

Default routing queue for **D00053 (Hire/Rehire of RSE Student Employee).**

The same routing queue will be used for **D00053, D00055 and D00057.**

Electronic Approval Routing Rules NTRROUT 9.3.4 (DSU)

User ID: LGIGER Mrs Lisa Weeks Giger Approval Category: D00053 Hire/Rehire RSE Student Emp

Start Over

▼ ELECTRONIC APPROVAL ROUTING RULES

Insert Delete Copy Filter

Level Code	Level	User ID	User ID Name	Required Action *
STAPPL	86	SMPHILLIPS	Ms Samantha Myers Phillips	Apply
STUDHR	84	SMPHILLIPS	Ms Samantha Myers Phillips	Approval
STSUP1	81			Approval
STSUP2	82			FYI
ORIGFY	85			FYI

|◀ ◀ 1 of 1 ▶ ▶| 10 ∨ Per Page Record 1 of 5

SAVE

Be sure to click on the SAVE button to commit your changes

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

1 - 2 of 2
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

1 - 2 of 2
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 hire/rehire a WSR/RSE student employee. 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#.

    o   The query date will default to today's date. Change the query date to the first day of the month. Examples: **08/01/2021**, **09/01/2021, 10/01/2021**, etc.

2. Select **Hire/Rehire WSR Student Employee, {D00052} or Hire/Rehire RSE Student Employee, {D00053}** 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 1st DAY OF THE CURRENT MONTH (AS SHOWN 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: ✱ [▓▓▓▓▓▓] [Lisa Weeks Giger] 🌵 🔍

After identifying an employee, **click the Approval Category drop down menu to select the EPAF for Hire/Rehire WSR Student Employee or Hire/Rehire RSE Student Employee.**

Query Date: MM/DD/YYYY ✱ [08/01/2021]
Approval Category: ✱ [Hire/Rehire WSR Student Employee, D00052 ▾] ←

[Go]

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	000376	00	Director of Human Resources	4113, Human Resource	Nov 16, 2015		Jul 31, 2021	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.

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: ✱ ▮▮▮▮▮▮ | Lisa Weeks Giger

Query Date: MM/DD/YYYY ✱ 08/01/2021
Approval Category: ✱ Hire/Rehire WSR Student Employee, D00052

Go

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	000376	00	Director of Human Resources	4113, Human Resource	Nov 16, 2015		Jul 31, 2021	Active
Primary	000377	00	Sr Secretary/Human Resources	4113, Human Resource	Feb 27, 1996	Jul 12, 1998	Jul 31, 1998	Terminated
Primary	000921	00	Interim Dir Human Resources	4113, Human Resource	Oct 01, 1999	Nov 15, 2015	Nov 30, 2015	Terminated
Primary	001122	00	Assessment Analyst/Adm Sec	4113, Human Resource	Jul 13, 1998	Sep 30, 1999	Sep 30, 1999	Terminated
Overload	001202	00	GST Instructor	4113, Human Resource	Nov 01, 2003	Nov 30, 2013	Nov 30, 2013	Terminated
Primary	002270	00	RSE-General Library	3019, General Library	Sep 01, 1991	Aug 25, 1994	Aug 31, 1994	Terminated
Overload	004031	00	Staff Award for Excellence	4113, Human Resource	Jun 01, 2008	Jun 30, 2008	Jun 30, 2008	Terminated

Active Jobs

By clicking the "All Jobs" button, a user is able to view all the jobs a student employee has had while at DSU.

3. Click on Go to begin the Hire/Rehire for WSR Student Employee or Hire/Rehire for RSE Student Employee.

New EPAF Person Selection

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

✱ - indicates a required field.

ID: ✱ ▮▮▮▮▮▮ | Lisa Weeks Giger

Query Date: MM/DD/YYYY ✱ 08/01/2021
Approval Category: ✱ Hire/Rehire WSR Student Employee, D00052

Go

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	000376	00	Director of Human Resources	4113, Human Resource	Nov 16, 2015		Jul 31, 2021	Active
Primary	000377	00	Sr Secretary/Human Resources	4113, Human Resource	Feb 27, 1996	Jul 12, 1998	Jul 31, 1998	Terminated
Primary	000921	00	Interim Dir Human Resources	4113, Human Resource	Oct 01, 1999	Nov 15, 2015	Nov 30, 2015	Terminated
Primary	001122	00	Assessment Analyst/Adm Sec	4113, Human Resource	Jul 13, 1998	Sep 30, 1999	Sep 30, 1999	Terminated
Overload	001202	00	GST Instructor	4113, Human Resource	Nov 01, 2003	Nov 30, 2013	Nov 30, 2013	Terminated
Primary	002270	00	RSE-General Library	3019, General Library	Sep 01, 1991	Aug 25, 1994	Aug 31, 1994	Terminated
Overload	004031	00	Staff Award for Excellence	4113, Human Resource	Jun 01, 2008	Jun 30, 2008	Jun 30, 2008	Terminated

Active Jobs

4. Click the All Jobs button to view all the current and previous jobs.

New EPAF Job Selection

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

ID: Lisa Weeks Giger ▮▮▮▮▮
Query Date: Aug 01, 2021
Approval Category: Hire/Rehire WSR Student Emp, D00052

Add Student Employment Job, C00051

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									●
	Primary	000376	00	Director of Human Resources	4113, Human Resource	Nov 16, 2015		Jul 31, 2021	Active	○

All Jobs
Next Approval Type   Go

New EPAF Job Selection

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

ID: Lisa Weeks Giger, ▮▮▮▮
Query Date: Aug 01, 2021
Approval Category: Hire/Rehire WSR Student Emp, D00052

Add Student Employment Job, C00051

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									●
	Primary	000376	00	Director of Human Resources	4113, Human Resource	Nov 16, 2015		Jul 31, 2021	Active	○
	Primary	000377	00	Sr Secretary/Human Resources	4113, Human Resource	Feb 27, 1996	Jul 12, 1998	Jul 31, 1998	Terminated	○
	Primary	000921	00	Interim Dir Human Resources	4113, Human Resource	Oct 01, 1999	Nov 15, 2015	Nov 30, 2015	Terminated	○
	Primary	001122	00	Assessment Analyst/Adm Sec	4113, Human Resource	Jul 13, 1998	Sep 30, 1999	Sep 30, 1999	Terminated	○
	Overload	001202	00	GST Instructor	4113, Human Resource	Nov 01, 2003	Nov 30, 2013	Nov 30, 2013	Terminated	○
	Primary	002270	00	RSE-General Library	3019, General Library	Sep 01, 1991	Aug 25, 1994	Aug 31, 1994	Terminated	○
	Overload	004031	00	Staff Award for Excellence	4113, Human Resource	Jun 01, 2008	Jun 30, 2008	Jun 30, 2008	Terminated	○

[Active Jobs]

[Next Approval Type] [Go]

> List of all positions the student has been employed in on campus after clicking the "All Jobs" button.

New 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. The correct position numbers for your department have been given to you on a separate sheet.**

EXAMPLE:		
Position #:	**Suffix #:**	**Description**
002270	00	Hire/Rehire of RSE Student Employee in Library Services

New EPAF Job Selection

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

ID: Lisa Weeks Giger, ▮▮▮▮
Query Date: Aug 01, 2021
Approval Category: Hire/Rehire WSR Student Emp, D00052

Add Student Employment Job, C00051

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job	003060	00	WSR-Human Resources	4113, Human Resource					●
	Primary	000376	00	Director of Human Resources	4113, Human Resource	Nov 16, 2015		Jul 31, 2021	Active	○
	Primary	000377	00	Sr Secretary/Human Resources	4113, Human Resource	Feb 27, 1996	Jul 12, 1998	Jul 31, 1998	Terminated	○
	Primary	000921	00	Interim Dir Human Resources	4113, Human Resource	Oct 01, 1999	Nov 15, 2015	Nov 30, 2015	Terminated	○
	Primary	001122	00	Assessment Analyst/Adm Sec	4113, Human Resource	Jul 13, 1998	Sep 30, 1999	Sep 30, 1999	Terminated	○
	Overload	001202	00	GST Instructor	4113, Human Resource	Nov 01, 2003	Nov 30, 2013	Nov 30, 2013	Terminated	○
	Primary	002270	00	RSE-General Library	3019, General Library	Sep 01, 1991	Aug 25, 1994	Aug 31, 1994	Terminated	○
	Overload	004031	00	Staff Award for Excellence	4113, Human Resource	Jun 01, 2008	Jun 30, 2008	Jun 30, 2008	Terminated	○

[Active Jobs]

[Next Approval Type] [Go]

VIEW EMPLOYEE CLASS:

- This section allows the originator to view the current employee's employment information.
- Employment Status must equal (A) – Active.

The following fields are **not enterable** and no action is required.	The following fields will need to be changed if applicable:
- Employee Class Code - Employee Status - Home COAS - Distribution COA - Original Hire Date - Last Work Date	- Home Organization - Distribution Orgn - Current Hire Date

✱ - indicates a required field.

Update Student Employment Record

Item	Current Value	New Value
Employee Class Code: (Not Enterable)	S1, Full Time Staff	ST
Employee Status: ✱(Not Enterable)	Active	A
Home COAS: (Not Enterable)	1	1
Home Organization: ✱	4113, Human Resource 🔍	4113
Distribution COA: (Not Enterable)	1	
Distribution Orgn: ✱	4113, Human Resource 🔍	4113
Current Hire Date: MM/DD/YYYY✱	02/27/1996	08/01/2021
Original Hire Date: MM/DD/YYYY(Not Enterable)	02/27/1996	
Last Work Date: MM/DD/YYYY(Not Enterable)		

Make the following changes if applicable.

Home Organization: The is the org of the student's primary job. If the student already has a primary job and is employed with another department, then the information is not change.

Distribution Org: The is the org of the student's primary job. If the student already has a primary job and is employed with another department, then the information is not change.

Home and Distribution Org should be the same in most cases.

Current Hire Date: This should be the first of day of the current month.

Update Student Employment Record

Item	Current Value	New Value
Employee Class Code: (Not Enterable)	S1, Full Time Staff	ST
Employee Status: ✱(Not Enterable)	Active	A
Home COAS: (Not Enterable)	1	1
Home Organization: ✱	4113, Human Resource 🔍	
Distribution COA: (Not Enterable)	1	1
Distribution Orgn: ✱	4113, Human Resource 🔍	
Current Hire Date: MM/DD/YYYY✱	02/27/1996	
Original Hire Date: MM/DD/YYYY(Not Enterable)	02/27/1996	
Last Work Date: MM/DD/YYYY(Not Enterable)		

Under the "Current Value", if the "Employment Status" is "Active", then enter the information the same information in the "Current Value" column in the fields under the "New Value" column.

If the "Employment Status" is "Terminated" under the "Current Value" column, enter the **new** information in the fields located in the "New Value" Column.

Under the "Current Value", if the "Employment Status" is "Active", then enter the information the same information in the "Current Value" column in the fields under the "New Value" column.

If the "Employment Status" is "Terminated" under the "Current Value" column, enter the **new** information in the fields located in the "New Value: Column.

ADD STUDENT EMPLOYMENT JOB

If the current value column is blank, then this position has not been activated for the student employee and the "JOB BEGIN DATE" field should be entered.

If the current value column has data in the column, this position has been activated for the student employee at one time and and the "JOB BEGIN DATE" field should not be entered.

Add Student Employment Job, 003060-00 WSR-Human Resources

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		08/01/2021
Jobs Effective Date: MM/DD/YYYY*		
Personnel Date: MM/DD/YYYY*		
Contract Type:		Primary
Title:		
Regular Rate: *		7.25
FTE: *(Not Enterable)		25
Employee Class Code: (Not Enterable		ST
Payroll Id: (Not Enterable)		ST
Leave Rept Pay Id: (Not Enterable)		ST
Timesheet Orgn:		
Job Change Reason: (Not Enterable)		HIRE
Step: (Not Enterable)		0
Job Status: (Not Enterable)		A

Add Student Employment Job, 003060-00 WSR-Human Resources, Last Paid Date: Apr 30, 2020

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY	10/01/2016	
Jobs Effective Date: MM/DD/YYYY*	04/30/2020	
Personnel Date: MM/DD/YYYY*	04/30/2020	
Contract Type:	Primary	Primary
Title:	WSR-Human Resources	
Regular Rate: *	7.25	7.25
FTE: *(Not Enterable)	.25	25
Employee Class Code: (Not Enterable)	ST, Students (WSR,RSE)	ST
Payroll Id: (Not Enterable)	ST	ST
Leave Rept Pay ID: (Not Enterable)	ST	ST
Timesheet Orgn:	4113	
Job Change Reason: (Not Enterable		HIRE
Step: (Not Enterable)	0	0
Job Status: (Not Enterable)	Terminated	A

NO ENTRY

NEXT STEPS

- Enter the following fields:
  - **Job Begin Date:** Only if applicable (see above examples)
  - **Job Effective Date:** should be the first day of the current month - Example: 08/01/2021
  - **Personnel Date:** should be the first day of the current month – Example: 08/01/2021
  - **Contract Type:** defaults to Primary. If employee already has a primary job, change contract type to Secondary
  - **Title:** title will default from position number   NO ENTRY
  - **Regular Rate:** enter the rate of pay. Field defaults to 8.00 for WSR and 7.25 for RSE.
  - **Timesheet Orgn:** This is the departments org in which the payroll timesheet should be sent. This may be different from the home and distribution org noted above in the view employee information section.

See example below.

Add Student Employment Job, 003060-00 WSR-Human Resources

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY		08/01/2021
Jobs Effective Date: MM/DD/YYYY*		08/01/2021
Personnel Date: MM/DD/YYYY*		08/01/2021
Contract Type:		Primary
Title:		
Regular Rate: *		7.25
FTE: *(Not Enterable)		.25
Employee Class Code: (Not Enterable)		ST
Payroll Id: (Not Enterable)		ST
Leave Rept Pay ID: (Not Enterable)		ST
Timesheet Orgn:		4113
Job Change Reason: (Not Enterable)		HIRE
Step: (Not Enterable)		0
Job Status: (Not Enterable)		A

Update Factor, Pays, and Hours

Field	Statement/Action	Action/Example
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
Job Begin Date:	Should be the first day of the current month and be the same date used throughout the EPAF	08/01/2021

Update Factors, Pays and Hours, 003060-00 WSR-Human Resources

Item	Current Value	New Value
Factor: *(Not Enterable)		12
Pays: *(Not Enterable)		12
Hours per Pay: *(Not Enterable)		30
Jobs Effective Date: MM/DD/YYYY*		08/01/2021

> Date entered is the first day of the current month:
>
> Example: 08/01/2021

LABOR DISTRIBUTIONS – 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 enter the first day of the current month. **Example: 08/01/2021**
- o Apply the appropriate changes to the field if necessary.

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, 003060-00 WSR-Human Resources

Current
Effective Date: 08/01/2021

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

New
Effective Date: MM/DD/YYYY 08/01/2021

> The effective date will default to the query date or today's date. This needs to be change to the first day of the current month:
>
> **Example: 08/01/2021**

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		310403	4113	62800	0605					100.00		
										Total: 100.00		

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

Default from Index Save and Add New Rows

Update Labor Distributions, 003060-00 WSR-Human Resources

Current												
Effective Date: 08/01/2021												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	

New												
Effective Date: MM/DD/YYYY 08/01/2021												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		310403	4113	62800	0605					.00		☐
										Total:	.00	

2. Enter the new accounting information. The following must be entered for each line.
    a. COA = enter 1.
    b. Fund No.
    c. Organization No.
    d. Account No. = 62800
    e. Percentage = totals must equal 100%. See sample below

3. Click to "Save and Add New Rows"

Update Labor Distributions, 003060-00 WSR-Human Resources

Current												
Effective Date: 08/01/2021												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	

New												
Effective Date: MM/DD/YYYY 08/01/2021												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		310403	4113	62800	0605					.00		☐
1		310405	4113	62800	0605					100.00		☐
										Total:	100.00	

Default from Index | Save and Add New Rows

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

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

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

Update Labor Distributions, 003060-00 WSR-Human Resources

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

Update Labor Distributions, 003060-00 WSR-Human Resources

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 All routing queues must have a supervisor approval. In some instances, departments may have two supervisors that will need to approve EPAF.

Student paid by grant funds: Add the approver STGRAN (Student Grants Approval).
Other approval levels will default.

WSR Student Routing Queue

- Student Supervisor 1
- Student Supervisor 2
- Financial Aid Approval – Lauren Boulanger
- Student HR Approval – Samantha Phillips
- Originator FY Completion
- Student Payroll Apply – Samantha Phillips

RSE Student Routing Queue

- Student Supervisor 1
- Student Supervisor 2
- Student HR Approval – Samantha Phillips
- Originator FY Completion
- Student Payroll Apply – Samantha Phillips

WSR Routing Queue Example

Routing Queue

Approval Level	User Name		Required Action	Remove
81 - (STSUP1) Student Supervisor Approver 1	🔍		Approve	
82 - (STSUP2) Student Supervisor Approver 2	🔍		FYI	
83 - (FINAID) Financial Aid Approval	🔍 LBOULANGER	Lauren Boulanger	Approve	
84 - (STUDHR) Student HR Approver	🔍 SMPHILLIPS	Samantha Myers Phillips	Approve	
85 - (ORIGFY) Originator FYI Completion	🔍		FYI	
86 - (STAPPL) Student Payroll Apply	🔍 SMPHILLIPS	Samantha Myers Phillips	Apply	
Not Selected	🔍		Not Selected	
Not Selected	🔍		Not Selected	
Not Selected	🔍		Not Selected	
Not Selected	🔍		Not Selected	

Save and Add New Rows

RSE Routing Queue Example

Routing Queue

Approval Level	User Name		Required Action
81 - (STSUP1) Student Supervisor Approver 1	🔍		Approve
82 - (STSUP2) Student Supervisor Approver 2	🔍		FYI
84 - (STUDHR) Student HR Approver	🔍		Approve
85 - (ORIGFY) Originator FYI Completion	🔍		FYI
86 - (STAPPL) Student Payroll Apply	🔍		Apply
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected

Save and Add New Rows

- Click on the **"Save and Add New Rows"**

COMMENTS

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

Comment

Student is also employed with Library Services as an RSE employee.

Student is also employed with Library Services as an RSE employee.

SAVE EPAF

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

Electronic Personnel Action Form

✔ Your change was saved successfully.
☐ Enter the information for the EPAF and either Save or Submit

Name and ID:	Lisa Weeks Giger, 900325716	Job and Suffix:	003060-00, WSR-Human Resources
Transaction:	15870	Query Date:	Aug 01, 2021
Transaction Status:	Waiting	Last Paid Date:	
Approval Category:	Hire/Rehire WSR Student Employee, D00052		

Save | Submit | Delete

SUBMIT EPAF

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

Electronic Personnel Action Form

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

Name and ID:	Lisa Weeks Giger, 900325716	Job and Suffix:	003060-00, WSR-Human Resources
Transaction:	15870	Query Date:	Aug 01, 2021
Transaction Status:	Pending	Last Paid Date:	
Approval Category:	Hire/Rehire WSR Student Employee, D00052		

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 remove a WSR/RSE student employee from payroll. 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 last day of the current month. Example: **08/31/2021, 09/30/2021, 10/31/2021**, etc.

3. Select **Termination of WSR Student Position {D00054} or Termination of RSE Student Position {D00055}** 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.
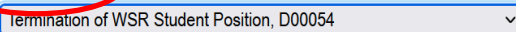
New EPAF Person Selection

💬 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

* - indicates a required field.

ID: ⬛ | Lisa Weeks Giger | 🌵 🔍

Query Date: MM/DD/YYYY ⬛ 08/31/2021

Approval Category: ⬛ Termination of WSR Student Position, D00054 ⬅

Go
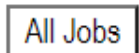
> After identifying an employee, **click the Approval Category drop down menu to select the EPAF for Termination of WSR Student Position or Termination of RSE Student Position.**

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	000376	00	Director of Human Resources	4113, Human Resource	Nov 16, 2015		Jul 31, 2021	Active
Secondary	003060	00	WSR-Human Resources	4113, Human Resource	Jun 01, 2020			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 Termination of WSR Student Position or Termination of RSE Student Position.

5. Click on the button [All Jobs] .

6. Select the position in which to terminate the student position by clicking on the radial dial at the end of the row. 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: Lisa Weeks Giger,
Query Date: Aug 31, 2021
Approval Category: Term WSR Student Position, D00054

Terminate Job Only, C00035

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
🔍	New Job									○
	Primary	000376	00	Director of Human Resources	4113, Human Resource	Nov 16, 2015		Jul 31, 2021	Active	○
	Primary	000377	00	Sr Secretary/Human Resources	4113, Human Resource	Feb 27, 1996	Jul 12, 1998	Jul 31, 1998	Terminated	○
	Primary	000921	00	Interim Dir Human Resources	4113, Human Resource	Oct 01, 1999	Nov 15, 2015	Nov 30, 2015	Terminated	○
	Primary	001122	00	Assessment Analyst/Adm Sec	4113, Human Resource	Jul 13, 1998	Sep 30, 1999	Sep 30, 1999	Terminated	○
	Overload	001202	00	GST Instructor	4113, Human Resource	Nov 01, 2003	Nov 30, 2013	Nov 30, 2013	Terminated	○
	Primary	002270	00	RSE-General Library	3019, General Library	Sep 01, 1991	Aug 25, 1994	Aug 31, 1994	Terminated	○
	Secondary	003060	00	WSR-Human Resources	4113, Human Resource	Jun 01, 2020			Active	●
	Overload	004031	00	Staff Award for Excellence	4113, Human Resource	Jun 01, 2008	Jun 30, 2008	Jun 30, 2008	Terminated	○

[Active Jobs]
[Go]

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

TERMINATE JOB

1. In the Jobs Effective Date field, enter the date the employee is to receive pay through or the date of termination. The termination date is usually the last day of the month.
2. In the Term Reason Code field, select the reason for termination/resignation by using the drop-down box.
   o Examples: Job Ended, Graduated, Voluntary, etc.

Jump to Bottom

Terminate Job Only, 003060-00 WSR-Human Resources

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	06/01/2020	08/31/2021
Job Status: (Not Enterable)	Active	T
Job Change Reason:		JBEND, Job Ends ⌄

> **In the Jobs Effective Date Field, enter the date the employee is to receive pay through or enter the last day of the month.**

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

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 All routing queues must have a supervisor approval. In some instances, departments may have two supervisors that will need to approve EPAF.

Student paid by grant funds: Add the approver STGRAN (Student Grants Approval).
Other approval levels will default.

WSR Student Routing Queue

- Student Supervisor 1
- Student Supervisor 2
- Financial Aid Approval – Lauren Boulanger
- Student HR Approval – Samantha Phillips
- Originator FY Completion
- Student Payroll Apply – Samantha Phillips

RSE Student Routing Queue

- Student Supervisor 1
- Student Supervisor 2
- Student HR Approval – Samantha Phillips
- Originator FY Completion
- Student Payroll Apply – Samantha Phillips

WSR Routing Queue Example

Routing Queue

Approval Level		User Name		Required Action	Remove
81 - (STSUP1) Student Supervisor Approver 1	🔍			Approve	
82 - (STSUP2) Student Supervisor Approver 2	🔍			FYI	
83 - (FINAID) Financial Aid Approval	🔍	LBOULANGER	Lauren Boulanger	Approve	
84 - (STUDHR) Student HR Approver	🔍	SMPHILLIPS	Samantha Myers Phillips	Approve	
85 - (ORIGFY) Originator FYI Completion	🔍			FYI	
86 - (STAPPL) Student Payroll Apply	🔍	SMPHILLIPS	Samantha Myers Phillips	Apply	
Not Selected	🔍			Not Selected	
Not Selected	🔍			Not Selected	
Not Selected	🔍			Not Selected	
Not Selected	🔍			Not Selected	

Save and Add New Rows

RSE Routing Queue Example

Routing Queue

Approval Level		User Name		Required Action
81 - (STSUP1) Student Supervisor Approver 1	🔍			Approve
82 - (STSUP2) Student Supervisor Approver 2	🔍			FYI
84 - (STUDHR) Student HR Approver	🔍			Approve
85 - (ORIGFY) Originator FYI Completion	🔍			FYI
86 - (STAPPL) Student Payroll Apply	🔍			Apply
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected

Save and Add New Rows

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

COMMENTS

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

Comment

Student has graduated and is no longer eligible to receive WSR funds.

Student's last day was August 31, 2021.

Student has graduated and is no longer eligible to receive WSR funds.

Student's last day was August 31. 2021.

SAVE EPAF

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

Electronic Personnel Action Form

✔ Your change was saved successfully.
💬 Enter the information for the EPAF and either Save or Submit

Name and ID:	Lisa Weeks Giger, 900325716	Job and Suffix:	003060-00, WSR-Human Resources
Transaction:	15893	Query Date:	Aug 31, 2021
Transaction Status:	Waiting	Last Paid Date:	
Approval Category:	Termination of WSR Student Position, D00054		

Save   Submit   Delete

SUBMIT EPAF

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

Electronic Personnel Action Form

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

Name and ID:	Lisa Weeks Giger, 900325716	Job and Suffix:	003060-00, WSR-Human Resources
Transaction:	15893	Query Date:	Aug 31, 2021
Transaction Status:	Pending	Last Paid Date:	
Approval Category:	Termination of WSR Student Position, D00054		

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 have to be corrected before submitting.

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 only be used to change the hourly rate for a WSR/RSE student employee currently set-up in Banner. It cannot be used if the employee is transferring to another position on campus.

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 hourly change. For example:

    *   If the change is to take place on any day of the month, then use the date the change will take place. If the change is to take place on the 1st day of the month, then use the first day of the month. See examples 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: * [███████] Lisa Weeks Giger 🔍

Query Date: MM/DD/YYYY * 08/15/2021

Approval Category: * Hourly Rate Change for WSR Employee, D00056 ⌄

Go

> This student's hourly rate will change on August 15, 2021. Enter 08/15/2021 in the query date block.

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	000376	00	Director of Human Resources	4113, Human Resource	Nov 16, 2015		Jul 31, 2021	Active
Secondary	003060	00	WSR-Human Resources	4113, Human Resource	Jun 01, 2020			Active

All Jobs

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: * [███████] Lisa Weeks Giger 🔍

Query Date: MM/DD/YYYY * 09/01/2021

Approval Category: * Hourly Rate Change for WSR Employee, D00056 ⌄

Go

> This student's hourly rate change on September 1, 2021. Enter 09/01/2021 in the query date block.

Employee Job Assignments

Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status
Primary	000376	00	Director of Human Resources	4113, Human Resource	Nov 16, 2015		Jul 31, 2021	Active
Secondary	003060	00	WSR-Human Resources	4113, Human Resource	Jun 01, 2020			Active

All Jobs

3. Select **Hourly Rate Change for WSR Employee {D00056} or Hourly Rate Change for RSE Employee {D00057}** from the drop- down approval category box.

CHANGES TO THE HOURLY RATE MUST HAVE SUPPORTING DOCUMENTATION AND FORWARDED TO OFFICE OF HUMAN RESOURCES.

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: ✱ [▮▮▮▮▮] Lisa Weeks Giger   👤 🔍

Query Date: MM/DD/YYYY ✱ 09/01/2021

Approval Category: ✱ Hourly Rate Change for WSR Employee, D00056 ▾

Go

Not Selected

One Time Payment - Extra Services (Non Academic Affairs), D00007

One Time Payment - Extra Services (Academic Affairs), D00008

Employee Job Assignments

Type	Position	Suffix	Title			Last Paid Date	Status
Primary	000376	00	Dire			Jul 31, 2021	Active
Secondary	003060	00	WSF				Active

All Jobs

Termination from DSU (Academic Affairs), D00009

Termination from DSU (Non Academic Affairs), D00010

Job Labor Distribution Change (Academic Affairs), D00015

Job Labor Distribution Change (Non Academic Affairs), D00016

Campus Address Change (Academic Affairs), D00022

Campus Address Change (Non Academic Affairs), D00023

Title and/or Salary Adjustment (Academic Affairs), D00011

Title and/or Salary Adjustment (Non Academic Affairs), D00012

Hourly Title and/or Rate Adjustment (Academic Affairs), D00013

Hourly Title and/or Rate Adjustment (Non Academic Affairs), D00014

RELEASE: 8.18

Hire/Rehire WSR Student Employee, D00052

Hire/Rehire RSE Student Employee, D00053

Termination of WSR Student Position, D00054

Termination of RSE Student Position, D00055

Hourly Rate Change for WSR Employee, D00056

Hourly Rate Change for RSE Employee, D00057

El

Use EPAFs **D00056** and **D00057** to change the hourly rate for a student and click "**GO**".

4. Click the radial button at the end of the row for the position requiring an hourly rate change and click [Go] . A new job should not be entered using this EPAF.

5. Click on [Go] to begin processing the EPAF.

VIEW EMPLOYEE EMPLOYMENT CLASS

No changes are needed – fields are not enterable

✱ - indicates a required field.

View Employee Employment Class

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

UPDATE HOURLY RATE

a. **JOB BEGIN DATE:** No entry – leave blank

b. **JOB EFFECTIVE DATE:** Enter the effective date of the student's hourly rate.

c. **PERSONNEL DATE:** Enter the effective date of the student's hourly rate. The Job Effective Date and Personnel Date should be the same.

d. **JOB STATUS:** No entry – leave blank

e. **TITLE:** Enter employee's new title, if applicable. If title is not changing, leave blank.

f. **FTE:** No entry – leave blank

g. **JOB CHANGE REASON:** Select the reason for change using the drop-down menu. (i.e. Title change – TITLE, receiving a promotion – PROMO, etc.)

h. **REGULAR RATE:** Enter the student's new hourly rate.

STUDENT'S HOURLY RATE CHANGE

Update Hourly Rate/Title Student, 003060-00 WSR-Human Resources

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY	06/01/2020	
Jobs Effective Date: MM/DD/YYYY*	06/01/2020	
Personnel Date: MM/DD/YYYY*	06/01/2020	
Job Status: (Not Enterable)	Active	A
Title:	WSR-Human Resources	
FTE: (Not Enterable)	1	25
Job Change Reason: *		Not Selected
Regular Rate:	7.25	

A student's hourly rate is changing on August 15, 2021, from $7.25/hour to $8.00/hour.

The EPAF will be entered using the following information:

Job Begin Date: No entry
Job Effective Date: 08/15/2021
Job Personnel Date: 08/15/2021
Job Status: No entry
Title: No entry
FTE: No entry
Job Change Reason: Wage (enter reason for change using the drop-down menu.)
Regular Rate: $8.00

SEE EXAMPLE 1 AT LEFT.

EXAMPLE 1: Hourly Rate Change

Update Hourly Rate/Title Student, 003060-00 WSR-Human Resources

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY	06/01/2020	
Jobs Effective Date: MM/DD/YYYY*	06/01/2020	08/15/2021
Personnel Date: MM/DD/YYYY*	06/01/2020	08/15/2021
Job Status: (Not Enterable)	Active	A
Title:	WSR-Human Resources	
FTE: (Not Enterable)	1	25
Job Change Reason: *		WAGE, Minimum Wage Increase
Regular Rate:	7.25	8.00

EXAMPLE 2: Hourly Rate Change

Update Hourly Rate/Title Student, 003060-00 WSR-Human Resources

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY	06/01/2020	
Jobs Effective Date: MM/DD/YYYY*	06/01/2020	09/01/2021
Personnel Date: MM/DD/YYYY*	06/01/2020	09/01/2021
Job Status: (Not Enterable)	Active	A
Title:	WSR-Human Resources	
FTE: (Not Enterable)	1	25
Job Change Reason: *		WAGE, Minimum Wage Increase
Regular Rate:	7.25	9.00

A student's hourly rate is changing on 09/01/2021, from $7.25/hour to $9.00/hour.

The EPAF will be entered using the following information:

Job Begin Date: No entry
Job Effective Date: 09/01/2021
Job Personnel Date: 09/01/2021
Job Status: No entry
Title: No entry
FTE: No entry
Job Change Reason: Wage (enter reason for change using the drop-down menu.)
Regular Rate: $9.00

SEE EXAMPLE 2 AT LEFT.

LABOR DISTRIBUTION – Update if Needed

- In the "CURRENT" section – the current labor codes and the effective date of the last change will default into the form.
- In the "NEW" section – add new rows or make changes to the existing rows.
- Changes to the accounting information will be <u>LIMITED</u>. The correct accounting information should default in the field according to the position number being used.
- The fund, organization, account, and program codes will <u>NOT</u> need to be change unless payment is being charged by grant or other funds.
- EFFECTIVE DATE: The effective date should enter the first day of the current month. **Example: 08/01/2021**
- Apply the appropriate changes to the field if necessary.

Steps to change Labor Distributions

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

- 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. = 62800

e. Percentage = totals must equal 100%. See sample below

- Click to "Save and Add New Rows"

Update Labor Distributions, 003060-00 WSR-Human Resources

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

8. Click on the box under the "Remove" Column to remove the old accounting information. The percentage should be set 0.00%.
9. 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, 003060-00 WSR-Human Resources

Current												
Effective Date: 08/01/2021												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	

New												
Effective Date: MM/DD/YYYY 08/01/2021												
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		310405	4113	62800	0605					100.00		☐
										Total: 100.00		

Default from Index   Save and Add New Rows

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.
- All routing queues must have a supervisor approval. In some instances, departments may have two supervisors that will need to approve EPAF.

> **Student paid by grant funds: Add the approver STGRAN (Student Grants Approval).**
> **Other approval levels will default.**

WSR Student Routing Queue

- Student Supervisor 1
- Student Supervisor 2
- Financial Aid Approval – Lauren Boulanger
- Student HR Approval – Samantha Phillips
- Originator FY Completion
- Student Payroll Apply – Samantha Phillips

RSE Student Routing Queue

- Student Supervisor 1
- Student Supervisor 2
- Student HR Approval – Samantha Phillips
- Originator FY Completion
- Student Payroll Apply – Samantha Phillips

WSR Routing Queue Example

Routing Queue

Approval Level	User Name		Required Action	Remove
81 - (STSUP1) Student Supervisor Approver 1			Approve	
82 - (STSUP2) Student Supervisor Approver 2			FYI	
83 - (FINAID) Financial Aid Approval	LBOULANGER	Lauren Boulanger	Approve	
84 - (STUDHR) Student HR Approver	SMPHILLIPS	Samantha Myers Phillips	Approve	
85 - (ORIGFY) Originator FYI Completion			FYI	
86 - (STAPPL) Student Payroll Apply	SMPHILLIPS	Samantha Myers Phillips	Apply	
Not Selected			Not Selected	
Not Selected			Not Selected	
Not Selected			Not Selected	
Not Selected			Not Selected	

Save and Add New Rows

RSE Routing Queue Example

Routing Queue

Approval Level	User Name		Required Action
81 - (STSUP1) Student Supervisor Approver 1	🔍		Approve
82 - (STSUP2) Student Supervisor Approver 2	🔍		FYI
84 - (STUDHR) Student HR Approver	🔍		Approve
85 - (ORIGFY) Originator FYI Completion	🔍		FYI
86 - (STAPPL) Student Payroll Apply	🔍		Apply
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected
Not Selected	🔍		Not Selected

Save and Add New Rows

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

COMMENTS

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

Comment

Student is receiving a minimum wage adjustment.

Student is receiving additional duties.

Student is receiving a minimum wage adjustment.

Student is receiving additional duties.

SAVE EPAF

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

Electronic Personnel Action Form

✅ Your change was saved successfully.
💬 Enter the information for the EPAF and either Save or Submit

Name and ID:	Lisa Weeks Giger, 900325716	Job and Suffix:	003060-00, WSR-Human Resources
Transaction:	15870	Query Date:	Aug 01, 2021
Transaction Status:	Waiting	Last Paid Date:	
Approval Category:	Hire/Rehire WSR Student Employee, D00052		

Save Submit Delete

Submit EPAF

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

Electronic Personnel Action Form

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

Name and ID:	Lisa Weeks Giger, 900325716	Job and Suffix:	003060-00, WSR-Human Resources
Transaction:	15870	Query Date:	Aug 01, 2021
Transaction Status:	Pending	Last Paid Date:	
Approval Category:	Hire/Rehire WSR Student Employee, D00052		

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 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:

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. For students, this generally will be the first day of the current month. For some grants, however, this will be another date.
   EXAMPLE: 09/01/2021   OR   10/29/2021 (Grant start date)

3. Select **Labor Distribution WSR Student {D00058) or Labor Distribution RSE Student** from the drop-down approval category box.

4. In the "CURRENT" section – the current labor codes and the effective date of the last change will default into the form.
   a. In the "NEW" section – add new rows or make changes to the existing rows.
   b. 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.
   c. 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.
   d. EFFECTIVE DATE: The effective date should be entered as the first day of the current month. **Example: 08/01/2021 or the effective date of the grant year.**
   e. Apply the appropriate changes to the field if necessary.

<u>Steps to change Labor Distributions</u>

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

Update Labor Distributions, 003060-00 WSR-Human Resources

Current
Effective Date: 08/01/2021

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

New
Effective Date: MM/DD/YYYY 08/01/2021

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		310403	4113	62800	0605					.00		☐

Total: .00

- 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. = 62800
    - j.   Percentage = totals must equal 100%. See sample below

- Click to "Save and Add New Rows"

Update Labor Distributions, 003060-00 WSR-Human Resources

Current
Effective Date: 08/01/2021

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

New
Effective Date: MM/DD/YYYY 08/01/2021

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		310403	4113	62800	0605					.00		☐
1		310405	4113	62800	0605					100.00		☐

Total: 100.00

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

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

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

Update Labor Distributions, 003060-00 WSR-Human Resources

Current
Effective Date: 08/01/2021

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

New
Effective Date: MM/DD/YYYY 08/01/2021

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		310403	4113	62800	0605					.00		☑
1		310405	4113	62800	0605					100.00		☐

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.

Update Labor Distributions, 003060-00 WSR-Human Resources

Current
Effective Date: 08/01/2021

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

New
Effective Date: MM/DD/YYYY 08/01/2021

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1		310405	4113	62800	0605					100.00		☐

Total: 100.00

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

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.
- All routing queues must have a supervisor approval. In some instances, departments may have two supervisors that will need to approve EPAF.

> **Student paid by grant funds: Add the approver STGRAN (Student Grants Approval).**
> **Other approval levels will default.**

WSR Student Routing Queue

- Student Supervisor 1
- Student Supervisor 2
- Financial Aid Approval – Lauren Boulanger
- Student HR Approval – Samantha Phillips
- Originator FY Completion
- Student Payroll Apply – Samantha Phillips

RSE Student Routing Queue

- Student Supervisor 1
- Student Supervisor 2
- Student HR Approval – Samantha Phillips
- Originator FY Completion
- Student Payroll Apply – Samantha Phillips

WSR Routing Queue Example

Routing Queue

Approval Level		User Name		Required Action	Remove
81 - (STSUP1) Student Supervisor Approver 1	🔍			Approve	
82 - (STSUP2) Student Supervisor Approver 2	🔍			FYI	
83 - (FINAID) Financial Aid Approval	🔍	LBOULANGER	Lauren Boulanger	Approve	
84 - (STUDHR) Student HR Approver	🔍	SMPHILLIPS	Samantha Myers Phillips	Approve	
85 - (ORIGFY) Originator FYI Completion	🔍			FYI	
86 - (STAPPL) Student Payroll Apply	🔍	SMPHILLIPS	Samantha Myers Phillips	Apply	
Not Selected	🔍			Not Selected	
Not Selected	🔍			Not Selected	
Not Selected	🔍			Not Selected	
Not Selected	🔍			Not Selected	

Save and Add New Rows

RSE Routing Queue Example

Routing Queue

Approval Level		User Name		Required Action
81 - (STSUP1) Student Supervisor Approver 1	🔍			Approve
82 - (STSUP2) Student Supervisor Approver 2	🔍			FYI
84 - (STUDHR) Student HR Approver	🔍			Approve
85 - (ORIGFY) Originator FYI Completion	🔍			FYI
86 - (STAPPL) Student Payroll Apply	🔍			Apply
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected
Not Selected	🔍			Not Selected

Save and Add New Rows

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

COMMENTS

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

Comment

New grant year

New grant year

Save EPAF

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

Electronic Personnel Action Form

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

Name and ID:	Lisa Weeks Giger, 900325716	**Job and Suffix:**	003060-00, WSR-Human Resources
Transaction:	15870	**Query Date:**	Aug 01, 2021
Transaction Status:	Waiting	**Last Paid Date:**	
Approval Category:	Hire/Rehire WSR Student Employee, D00052		

Save | Submit | Delete

Submit EPAF

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

Electronic Personnel Action Form

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

Name and ID:	Lisa Weeks Giger, 900325716	**Job and Suffix:**	003060-00, WSR-Human Resources
Transaction:	15870	**Query Date:**	Aug 01, 2021
Transaction Status:	Pending	**Last Paid Date:**	
Approval Category:	Hire/Rehire WSR Student Employee, D00052		

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.

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.

Enter your username and password and click sign-in.

1. You may be asked to verify additional security verification. Enter the appropriate response.
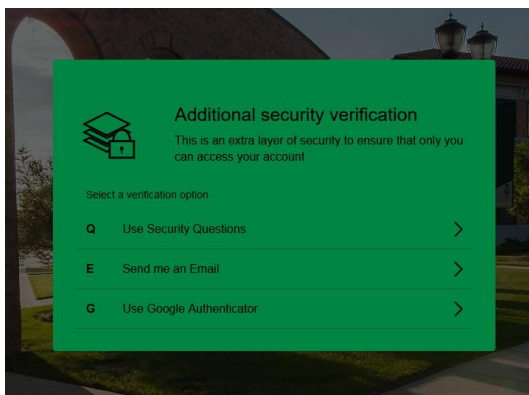
2. Click on Employee Services.
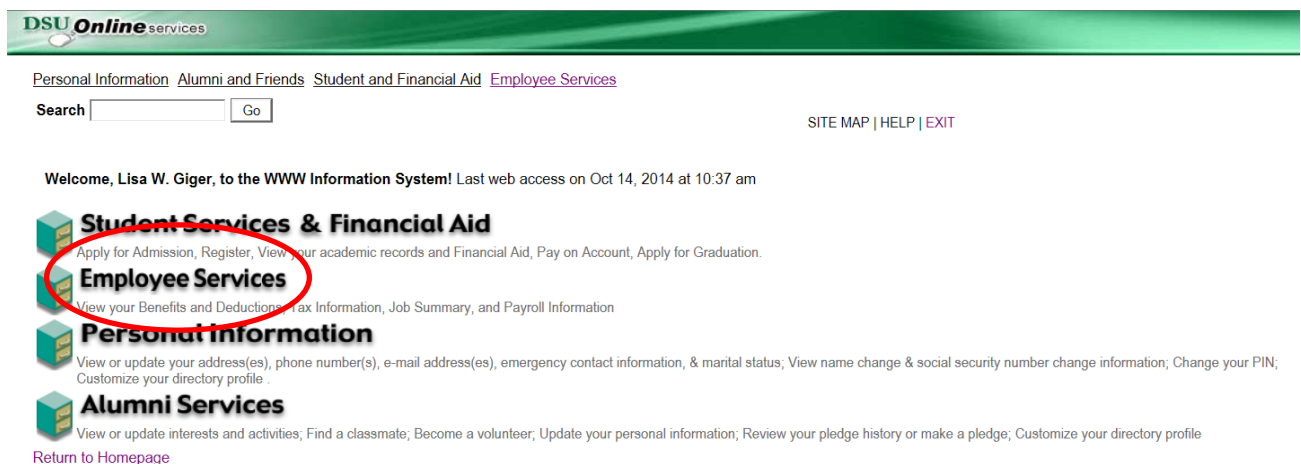
3. Click on Electronic Personnel Action Forms

Employee Services

Time Sheet
Electronic Personnel Action Forms
Benefits and Deductions
Retirement, health, flexible spending, miscellaneous, beneficiary, open enrollment, Benefit Statement.
Pay Information
Direct deposit allocation, earnings and deductions history, or pay stubs.
Tax Forms
W4 information, W2 Form or T4 Form.
Jobs Summary
Leave Balances
RELEASE: 8.10.1

4. 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

✔ 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.