

ELECTRONIC PERSONNEL ACTION FORM (EPAF)

Banner Human Resources Self Service Student User Manual



Release 1.0 August 2021

Table of Contents			
ntroduction:	3		
Navigation, Approval Category and Routing Queues			
EPAFs Originators:	4		
How to Search for a Person:	7		
Selecting the Applicable Approval Category	11		
How to Create a Default Routing Queue	12		
How to Review the Originators Transactions and Their Statuses	.14		

General:

Hire/Rehire WSR/RSE Student Employee	16
Remove WSR/RSE Student from Payroll	26
Hourly Rate Change for WSR/RSE Student Employee	31
Update Labor Distributions for WSR/RSE Student Employee	40

EPAF Approvers

Accessing the EPAF Menu and Approver Summary	45
The Current Link	47
Reviewing Your Work before Approving	49
The "In MY Queue" Link	50
The History Link	51

IMON EPAF ERRORS

INTRODUCTION

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

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

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

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

EPAF ORIGINATORS

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

Accessing EPAF menu in DSU Online Services

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

Accessing Employee Self Service through DSU Online Services

Employee Self Service can be accessed through the DSU website:

- 1. Open your internet browser on your computer.
- 2. Click on myDSU.
- 3. Click on Login under DSU online services.

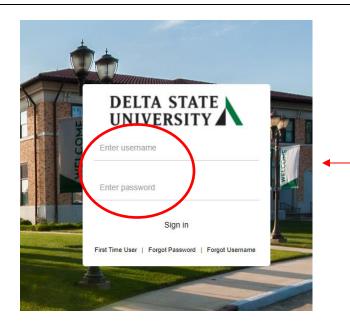


DSU Online is a convenient way to take care of business online for Faculty, Staff, and Students. Within DSU Online students can register for classes, check grades, view unofficial transcripts, pay for tuition, and more. Faculty members can advise students, post grades, view advisees transcripts and more.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



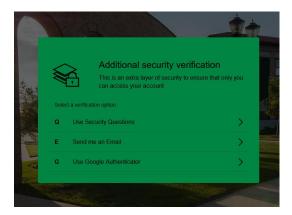
Canvas is the University's new learning management system (LMS). All online courses and content will be delivered from Canvas beginning June 2013. For additional resources and assistance with Canvas please visit more information.



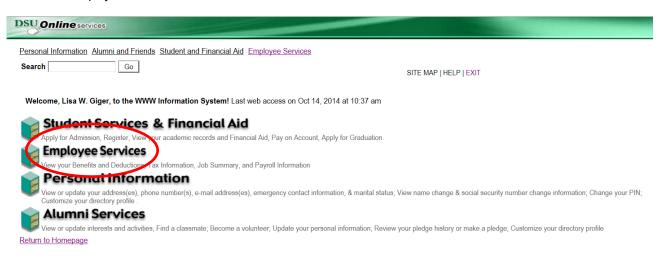


Enter your username and password and click sign-in.

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 Sei	rvices
Time Sheet	
Electronic Personnel Action	Forms
Benefits and Deductions Retirement, health, flexible sper	nding, miscellaneous, beneficiary, open enrollment, Benefit Statement
Pay Information Direct deposit allocation, earning	gs 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 serv		and Financial Aid [®] Employee Services				
reisonal mormation	Alumini and Friends- Student a	Ind Financial Ald Employee Services				
Search	Go	RETURN TO E	EMPLOYEE MENU	SITE MAP	HELP	EXIT

Electronic Personnel Action Form

EPAF Approver Summary	
EPAF Originator Summary	
New EPAF <	To initiate a new EPAF – select
EPAF Proxy Records	"New EPAF"
Act as a Proxy	
RELEASE: 8.9	

How to Search for a Person

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

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

Number". After the search information has been entered, CLICK Go.	DSU Online services
• Even a ID, when the two search for an ID, or generate an ID. Event the Query Date and whend the Approval Category. Search of a ID is a search employee by name is a carch employee. Event the Last Name and of Pire Name, or order an ID, or order the SSNESNTIN. Select Qo. A percent segn may be used as a carch employee is 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 Col. To search by using the name you can enter it in the fields provided then press the Col 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 Col.	
Click on the magnifying glass to search employee by name Person Search • Order you have breased 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 To search by using the name you can enter it in the fields provided then press the 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	New EPAF Person Selection
Check the box to the 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 witched Surface Image: Source of the search of the search of 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 witched Surface Image: Source of the search of 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 To search by using the name you can enter it in the fields provided then press the Go 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	 * - Indicates a required field. ID: Click on the magnifying glass to search employee by name Query Date: MM/DD/YYYY O8/01/2021 Approval Category: Not Selected
Imployment Imployment Imployment I	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
Conce 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 .	Employee: Last Name: First Name:
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 G_0 . To search by using the name you can enter it in the fields provided then press the G_0 button. If you do not know the full name or don't know the proper spelling you can search by using a partial portion of their name. See the example below for how to enter a search using the % wild card search symbol. Click on G_0 .	SSN/SIN/TIN Records per Page: 26 💌
To search by using the name you can enter it in the fields provided then press the G_{O} 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 G_{O} .	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
If the action is for an existing employee, click the "Employee" box to limit the search.	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
	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			
	←──		
	jer%		
First Name:			
Or			
ID:			
Or			
SSN/SIN/TIN:			
Records per Pag	e: 25 v		
Go			
\smile			
Person S	Search Re	sults	
	/	·	
_			
🔍 To choose	e a person, sele	ect a link under l	D.
/			
/			
Jump to Bottor	n		
	<u></u>		
	🛆 Last Name	A 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 Christoper	Avery Allen
	Giger		

1 - 11 of 11 <u>Return to Top</u>

Person Search Results

To choose a person, select a link under ID.

Jump to Bottom

(

	A Last Name ▼	A First Name ▼	Click on	the ID field in order to select the er	nployee.	
	Giger	Ann				
	Giger	Lisa	Weeks			
	Giger	Dennis	Wayne			
	Giger	Charles	F			
	Giger	Barbara	F			
	Giger	Jason	С			
	Giger	Daniel	Wayne			
	Giger	Phillip	L			
	Giger	Aaron	Brett			
	Giger	Jared	Avery			
	Giger	Christoper	Allen			
	1		r generate an ID. E	nter the Query Date and select the Approval Category. S	elect Go.	
ID: •	Lisa Wee	ks Giger	å 0			o down menu to select the personne to execute from the Approval
Query Date: I	MM/DD/YYYY 08	/02/2021			ategory.	

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	Campus Address Change (Academic Affairs), D00022	*	
Personal Information Alumnia	Campus Address Change (Non Academic Affairs), D00023	e ⁻	
Search	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		
New EPAF Person	Hourly Title and/or Rate Adjustment (Non Academic Affairs), D00014		After identifying an employee, click
	Hire/Rehire WSR Student Employee, D00052		the Approval Category drop down
Enter an ID, select the link	Hire/Rehire RSE Student Employee, D00053	Approval Category. Select Go.	menu to select the EPAF that
* - indicates a required field.	Termination of WSR Student Position, D00054		represents the desired personnel
ID:	_ Termination of RSE Student Position, D00055		action needed.
Lisa	Hourly Rate Change for WSR Employee, D00056		action needed.
Query Date: MM/DD/YYYY	Hourly Rate Change for RSE Employee, D00057		
Approval Category: 🗰	Not Selected	· j	
Go			
		ary EPAF Originator Summary	
		ary EFAF Originator Summary	
	Return	n to EPAF Menu	
	rear		
RELEASE: 8.18			
New FPAF Pe	erson Selection		
_			

Tenter 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 V	Veeks 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.

				T 9.3.4 (DSU)				
User ID:	LGIGER	Mrs	s Lisa Weeks Giger				Go	
Approval Category:	D00052			Hire/Rehire WSR Student	Emp		×	
Get Started: Comple ENTER.	ete the fields abc	ve and click Go. To s	earch by name, pres	ss TAB from an ID field, enter	your search crit	eria, and th	en press	
ter the correspond uting queue.	ing EPAF App	roval Category and	d enter the default	routing queue for each. C	Click on	Go	to begir	n enterin
D00052 - Hire/Rehire WSR Student EmployeeD00055 - TerminatiD00053 - Hire/Rehire RSE Student EmployeeD00056 - Hourly RaD00054 - Termination of WSR Student PositionD00057 - Hourly Ra						VSR Emp	loyee	
		0.50 (III)				to option	e roquir	od Enta
	isor's name f	or STSUP1 and i	f applicable for S	Dent Employee) and the state of	a second su	pervisor, t	hen ent	
ppropriate supervisername STSUP1 ick on the same routing c	isor's name fo I. Enter your button on th queue will be	or STSUP1 and i user name as the le lower right corr used for <mark>D00052</mark>	f applicable for S e ORIGFY. This ner or hit F10 on 2, D00054 and	STSUP2. If there is not a will notify you once the your keyboard to comr	a second sup EPAF has b	pervisor, f een proce	hen ent	er the
ppropriate supervisername STSUP1 lick on the SAVE ne same routing of	isor's name for I. Enter your button on th queue will be Ele	or STSUP1 and i user name as the le lower right corr used for <u>D00052</u> ectronic Approval Rou	f applicable for S e ORIGFY. This ner or hit F10 on 2, D00054 and uting Rules NTRROU	STSUP2. If there is not a will notify you once the your keyboard to comr	a second sup EPAF has b	pervisor, t een proce	hen ent	
ppropriate supervision ername STSUP1 ick on the SAVE ne same routing c	isor's name for I. Enter your button on th queue will be Ele	or STSUP1 and i user name as the le lower right corr used for <u>D00052</u> ectronic Approval Rou	f applicable for S e ORIGFY. This ner or hit F10 on 2, D00054 and uting Rules NTRROU	STSUP2. If there is not a will notify you once the your keyboard to comr	a second sup EPAF has b	pervisor, f een proce	hen ent	er the ▲ ☆
propriate supervi ername STSUP1 ick on the SAVE he same routing c	isor's name fo I. Enter your button on th queue will be Ele s Lisa Weeks G	or STSUP1 and i user name as the le lower right corr used for <u>D00052</u> ectronic Approval Rou iger Approval Categ	f applicable for S e ORIGFY. This ner or hit F10 on 2, D00054 and uting Rules NTRROU	STSUP2. If there is not a will notify you once the your keyboard to comr	a second sup EPAF has b	pervisor, f een proce	hen entessed.	er the ■ ☆
propriate supervi ername STSUP1 ick on the SAVE ne same routing of Save ne same routing of Save ne same routing of Save ne same routing of Save ne same routing of Save	isor's name fo I. Enter your button on th queue will be Ele s Lisa Weeks G	or STSUP1 and i user name as the le lower right corr used for <u>D00052</u> ectronic Approval Rou iger Approval Categ	f applicable for S e ORIGFY. This ner or hit F10 on 2, D00054 and uting Rules NTRROU	STSUP2. If there is not a will notify you once the your keyboard to comr	a second su EPAF has b nit your char	pervisor, f een proce nges.	hen ent essed.	er the ▲ ☆
ppropriate supervisername STSUP1 ick on the SAVE ne same routing of Ser ID: LGIGER Mr ELECTRONIC APPRO	isor's name for I. Enter your button on th queue will be Ele s Lisa Weeks G VAL ROUTING RU	or STSUP1 and i user name as the le lower right corr used for D00052 ectronic Approval Rou iger Approval Catego	f applicable for S e ORIGFY. This ner or hit F10 on 2, D00054 and uting Rules NTRROU gory: D00052 Hire/	STSUP2. If there is not a will notify you once the your keyboard to comr	a second su EPAF has b nit your char	eervisor, f een proce nges.	hen ent essed.	er the ▲ ☆
ppropriate supervisername STSUP1 ick on the SAVE ne same routing of Save ne same routing of Level Code STSUP1	isor's name for L. Enter your button on the gueue will be Ele S Lisa Weeks G VAL ROUTING RU Level 8	or STSUP1 and i user name as the le lower right corr used for D00052 ectronic Approval Rou liger Approval Catego uLES User ID	f applicable for S e ORIGFY. This ner or hit F10 on 2, D00054 and uting Rules NTRROU gory: D00052 Hire/	STSUP2. If there is not a will notify you once the your keyboard to comr	a second su EPAF has b nit your char	eervisor, f een proce iges. Delete Required A	hen ent essed.	er the ▲ ☆
ppropriate supervisername STSUP1 ick on the SAVE ne same routing of Save Save Save Save Save Save Save Save	isor's name for i. Enter your button on the queue will be Election s Lisa Weeks G VAL ROUTING RU Level 8 8 8	or STSUP1 and i user name as the le lower right corr used for D00052 ectronic Approval Rou liger Approval Catego uLES User ID	f applicable for S e ORIGFY. This ner or hit F10 on 2, D00054 and uting Rules NTRROU gory: D00052 Hire/	STSUP2. If there is not a will notify you once the your keyboard to comr <u>D00056.</u> JT 9.3.4 (DSU) Rehire WSR Student Emp	a second su EPAF has b nit your char	eervisor, f een proce nges.	hen ent essed.	er the ▲ ☆
propriate supervisername STSUP1 ick on the SAVE ne same routing of Save ne same routing of Level Code STSUP1 STSUP2 FINAID	isor's name for I. Enter your button on the queue will be Election S Lisa Weeks G VAL ROUTING RU Level 8 8 8 8 8	or STSUP1 and i user name as the le lower right corr used for D00052 ectronic Approval Rou iger Approval Catego LES User ID	f applicable for S e ORIGFY. This ner or hit F10 on 2, D00054 and uting Rules NTRROU gory: D00052 Hire/	STSUP2. If there is not a will notify you once the your keyboard to comr D00056. JT 9.3.4 (DSU) Rehire WSR Student Emp	a second su EPAF has b nit your char	een proce nges.	hen ent essed.	er the ▲ ★
Depropriate supervisername STSUP1 lick on the SAVE ne same routing of X V User ID: LGIGER Mr ELECTRONIC APPRO Level Code STSUP1 STSUP2 FINAID STUDHR	isor's name for i. Enter your button on the gueue will be Elec S Lisa Weeks G VAL ROUTING RU Level 8 8 8 8 8 8 8 8 8 8 8 8 8	or STSUP1 and i user name as the le lower right corr used for D00052 ectronic Approval Rou liger Approval Catego User ID 11 22 33 LBOULANGER	f applicable for S e ORIGFY. This ner or hit F10 on 2, D00054 and uting Rules NTRROU gory: D00052 Hire/ User ID Name Mrs. Lauren Bou	STSUP2. If there is not a will notify you once the your keyboard to comr D00056. JT 9.3.4 (DSU) Rehire WSR Student Emp	a second su EPAF has b nit your char	eervisor, f een proce nges.	hen ent essed.	er the ▲ ★
ppropriate supervisername STSUP1 lick on the SAVE he same routing of X I Carlos Arrows User ID: LGIGER Mr	isor's name for l. Enter your button on the queue will be Elec s Lisa Weeks G VAL ROUTING RU Level 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	or STSUP1 and i user name as the le lower right corr used for D00052 ectronic Approval Rou iger Approval Catego User ID 1 1 2 3 LBOULANGER 4 SMPHILLIPS	f applicable for S e ORIGFY. This ner or hit F10 on 2, D00054 and uting Rules NTRROU gory: D00052 Hire/ User ID Name Mrs. Lauren Bou	STSUP2. If there is not a will notify you once the your keyboard to comr D00056. JT 9.3.4 (DSU) Rehire WSR Student Emp	a second su EPAF has b nit your char	eervisor, f een proce ages.	hen ent essed.	er the ▲ ★

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

User ID: LGIGER Mrs L	isa Weeks Gige	er Approval Categ	Jory: D00053 Hire/Rehire RSE Student Emp		(Start	Over
ELECTRONIC APPROVAL		S		Insert	Delete	Га Сору	🕄 Filte
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		



 \blacksquare

Be sure to click on the



button to commit your changes

SAVE

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: 🖕	å Q	
Query Date: MM/DD/YYYY	10/17/2014	
Approval Category: 🏚	Not Selected	▼
Go		
		EPAF Approver Summing EPAF Originator Summary

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.

Return to EPAF Menu

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

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

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

EPAF Preview



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

COAlin	dex Fund	Organizati			ity I ocation Project (Cost Percent Encumbr	ance Override End Da
1	10	3006	61200	0101		100.00	
New							
		0/01/2014					
COA In	dex Fund	Organizat	ion Accoun	t Program Activ	ity Location Project C	Cost Percent Encumbr	ance Override End Da
1	10	0305	61200	0101		.00	
	Queue						
Routing		Maria		Dequired Ac	tion Queue Status Actio	n Data	
Routing	I Level	Name					
Approva		Name 90 Lisa Wee	ks Giger, LG	GER Approve	In the Queue	on Date	

Created: Oct 06, 2014 Lisa Weeks Giger

Hire/Rehire WSR/RSE Student Employee

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 $^{\circ}$ magnifying glass to search for an employee's 900#.
 - The query date will default to today's date. Change the query date to the first day of the month. 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 dropdown 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	Category. Select Go. 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.
Employee Job Assignments Type Position Suffix Title Time Sheet Organization Start Date End Date/Last Paid D Primary (000376 00 Director of Human Resources/4113, Human Resource Nov 16, 2015 Jul 31, 202* All Jobs	

New EPAF Person Selection Renter 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] 🛟 🔍 Lisa Weeks Giger ID: # Query Date: MM/DD/YYYY 08/01/2021 Hire/Rehire WSR Student Employee, D00052 Approval Category: ~ Go Employee Job Assignments Primary 000376 00 Director of Human Resources 4113, Human Resource Nov 16, 2015 Jul 31, 2021 Active By clicking the "All Jobs" button, a user Primary 000377)0 Sr Secretary/Human Resources 4113, Human Resource Feb 27, 1996 Jul 12, 1998 Jul 31, 1998 Terminated Interim Dir Human Resources 4113, Human Resource Oct 01, 1999 Nov 15, 2015 Nov 30, 2015 is able to view all the jobs a student Primary 000921 00 Terminated Primary 001122 00 Assessment Analyst/Adm Sec 4113, Human Resource Jul 13, 1998 Sep 30, 1999 Sep 30, 1999 Terminated employee has had while at DSU. Overload 001202 00 GST Instructor 4113, Human Resource Nov 01, 2003 Nov 30, 2013 Nov 30, 2013 Terminated RSE-General Library 3019, General Library Sep 01, 1991 Aug 25, 1994 Aug 31, 1994 Terminated 002270 00 Primary Overload 004031 00 Staff Award for Excellence 4113, Human Resource Jun 01, 2008 Jun 30, 2008 Jun 30, 2008 Terminated Active Jobs Go to begin the Hire/Rehire for WSR Student Employee or Hire/Rehire for RSE Student Employee. Click on 3. New EPAF Person Selection Renter 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. **#** Q Lisa Weeks Giger ID: 🗰 Query Date: MM/DD/YYY Approval Category: Hire/Rehire WSR Student Employee, D00052 ~ Go Employee Job Assignments 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 Assessment Analyst/Adm Sec 4113, Human Resource Jul 13, 1998 Primary 001122 00 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 4113, Human Resource Jun 01, 2008 Jun 30, 2008 Jun 30, 2008 Terminated Staff Award for Excellence Active Jobs All Jobs 4. Click the button to view all the current and previous jobs. New EPAF Job Selection Renter or search for a new position number and enter the suffix, or select the link under Title isa Weeks Gige ery Date Aug 01, 2021 Rehire WSR Student Emp, D00052 Add Student Employment Job, C00051 ector of Human Resour 4113, Human Resource Nov 16, 201 Jul 31, 2021 All Jobs Go

New EPAF Job Selection

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

ID:	Lisa Weeks Giger, 9
Query Date:	Aug 01, 2021
Approval Category:	Hire/Rehire WSR Student Emp, D00052

ch Type 👘	Position	Suffix	Title	Time Sheet Organization	Start Date		Last Paid Date	Status	
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	1001202	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	1004031	00	Staff Award for Excellence	4113, Human Resource	Jun 01, 2008	Jun 30, 2008	Jun 30, 2008	Terminated	

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

Next Approval Type Go

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 <u>Go</u>. 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

Renter 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

rch	Туре	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	S
	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	
I	Primary	000921	00	Interim Dir Human Resources	4113, Human Resource	Oct 01, 1999	Nov 15, 2015	Nov 30, 2015	Terminated	
I	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	
I	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	

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

Update Student Employment Record

Employee Class Code: (Not Enterable)

Employee Status: *(Not Enterable)

Distribution COA: (Not Enterable)

Current Hire Date: MM/DD/YYYY*

Last Work Date: MM/DD/YYYY(Not Enterable)

Original Hire Date: MM/DD/YYYY(Not Enterable) 02/27/1996

Home COAS: (Not Enterable)

Home Organization: *

Distribution Orgn: *

Item

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	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)		

Current Value

Active

02/27/1996

1

S1, Full Time Staff

4113, Human Resource

4113, Human Resource

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.

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 <u>new</u> 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.

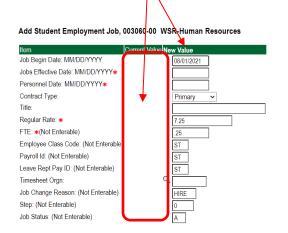
Nw Value

ST

If the "Employment Status" is "Terminated" under the "Current Value" column, enter the <u>new</u> 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.



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: \star	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:	Q 4113 -
Job Change Reason: (Not Enterable)	HIRE
Step: (Not Enterable)	0
Job Status: (Not Enterable)	A

If the current value column has data in the column, this

employee at one time and and the "JOB BEGIN DATE" field

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

NO ENTRY

~

Primary

7 25

ST

ST

HIRE

Α

position has been activated for the student

10/01/2016

04/30/2020

04/30/2020

WSR-Human Resources

e) ST, Students (WSR,RSE)

Primary

7.25

25

ST

ST

0

Terminated

4113

should not be entered.

Job Begin Date: MM/DD/YYYY

Jobs Effective Date: MM/DD/YYYY

Employee Class Code: (Not Enterab

Leave Rept Pay ID: (Not Enterable)

Job Change Reason: (Not Enterabl

Personnel Date: MM/DD/YYYY*

Item

Title

Contract Type

Regular Rate: *

Timesheet Oran:

Step: (Not Enterable)

Job Status: (Not Enterable)

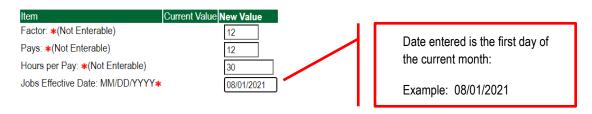
FTE: *(Not Enterable)

Payroll Id: (Not Enterable)

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	08/01/2021
	the EPAF	

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



LABOR DISTRIBUTIONS – Update if Needed

- 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.
- 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.
- 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 310403	Organization	n Account 62800	Program	Activity	Location	Project	Co	ost Percent Encumbrance Override Encumbrance Overri	
۵ ۵ ۵					ू द ू द			[al:	Change this percentage to 0.00 and click on Save and Add New Rows.
Default from Inde	Save and Add N	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				Activity Loca	tion Projecticos	supercentiend	umbrance Ov	ernde End Da	Ite		
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date Remove
م 1		310403	Q 4113	Q 62800	Q 0605	Q				.00	
2		Q.	9	9	9	Q					
^ _		Q	Q.	۹.	Q.	٩					
~		9	9	9	9	9					
<u>م</u> –		9	Q.	9	Q	9					
									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 08001/2021 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date/Remove 1 3 310403 4 4113 5 52000 6 0605 6 10 00 00 000000000000000000	
	Enter COA, Fund #, Org#, and Account# and percentage.
Default from Infox Save and Add New Roves	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	
Current Effective Date: 08/01/2021 CCA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date	
Now Effective Date: MM/DD/YYYY 08/01/2021	
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date Percent Encumbrance Override End	Click the remove button on
	the line that has 0.00% entered. Then 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	
Effective Date: MM/DD/YYYY (08/01/2021 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End DateRemove (1) (3) (3) (4) (4) (4) (6) (6) (6) (6) (6) (6) (6) (6) (6) (6	
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: <u>Add the approver STGRAN (Student Grants Approval)</u>. 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

WSR Routing Queue Example

RSE Student Routing Queue

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

Routing Queue

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

RSE Routing Queue Example

Routing Queue

Approval Level	User Name	Required Action
81 - (STSUP1) Student Supervisor Approver 1	٩	Approve
82 - (STSUP2) Student Supervisor Approver 2	۹	FYI
84 - (STUDHR) Student HR Approver	٩	Approve
85 - (ORIGFY) Originator FYI Completion	٩,	FYI
86 - (STAPPL) Student Payroll Apply	٩	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Net Selected		Not Selected

• Click on the "Save and Add New Rows"

COMMENTS

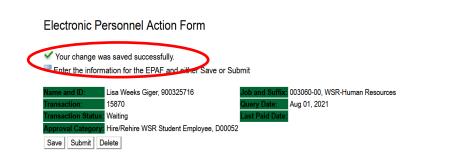
In the "Comments" section, enter comments for the approvers with an explanation for the action.

omment	
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



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 Pe	ersonnel Action Form		
<		has been successfully submitted. Nation for the EPAF and either Save or Sub		
	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		
Туре	Message Type	Description
Add Employee Job	WARNING	*WARNING* This employee is terminated on the Employee Form.
Add Employee Job	WARNING	*WARNING* The Employee's Term Date and Reason should be removed from PEAEMPL.
Add Employee Job	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
Update Factors, Pays and Hours	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
- indicates a required field.		

DELETE

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

Remove WSR/RSE Student from Payroll

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 $^{\circ}$ 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.
- 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.

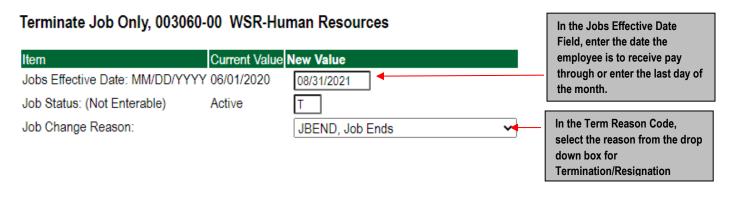
	After identifying an employee, click the Approval Category drop down menu to select the EPAF for Termination of WSR Student Position or Termination of RSE Student Position.
	st Paid Date Status 131,2021 Active Active all active positions. By clicking the All Jobs button, it will display all current and previous jobs.
 Click on Go to begin the Termination of WSR Student Position of Student Position of Click on the button All Jobs . Select the position in which to terminate the student position by click of the position of the student position by click of the position of the student position by click of the position of the student position by click of the position of the student position by click of the position of the student position of the student position by click of the position of the student position of the student position by click of the position of the student position by click of the student position by click of the position of the student position by click of the position of the student position by click of the position of the student position by click of the position of the student position by click of the position of the student position by click of the position of the student position by click of the position of the student position by click of the position of the student position by click of the position of the student position by click of the position of the student position by click of the position of the student position by click of the position by c	r Termination of RSE Student Position.
5. Click on the button All Jobs .	r Termination of RSE Student Position.

C.11	ter or search	for a new p	osition	number and enter the suffix, or s	elect the link under Title.						
):		Lisa We		ger,							
	/ Date:	Aug 31, w: Term WS		dent Position, D00054							
ppre	an outogo		on olu								
rmir	nate Job On		0 1				End Date	Last Paid Date			
	h Type New Job	Position	Suin	< Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select	
										0	
	Primary	000376	00	Director of Human Resources	4113, Human Resource	Nov 16, 2015	5	Jul 31, 2021	Active	0	
	Primary	000377	00	Sr Secretary/Human Resources	4113, Human Resource	Feb 27, 1996	5 Jul 12, 1998	Jul 31, 1998	Terminated		
										0	
	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		
										0	
	Overload	001202	00	GST Instructor	4113, Human Resource	Nov 01, 2003	3 Nov 30, 2013	Nov 30, 2013	Terminated		
	Primary	002270	00	RSE-General Library	3019, General Library	Sep 01, 199'	1 Aug 25, 1994	Aug 31, 1994	Terminated		
										0	
	Secondary	003060	00	WSR-Human Resources	4113, Human Resource	Jun 01, 2020			Active	•	- Find the isk and slick the red
	Overload	004031	00	Staff Award for Excellence	4113, Human Resource	Jun 01, 2008	Jun 30, 2008	Jun 30, 2008	Terminated		Find the job and click the radi
										0	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.
 - Examples: Job Ended, Graduated, Voluntary, etc.

Jump to Bottom



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: <u>Add the approver STGRAN (Student Grants Approval)</u>. 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	Us	er Name		Required Action	Remov
81 - (STSUP1) Student Supervisor Approver 1	Q			Approve	
82 - (STSUP2) Student Supervisor Approver 2	_ Q			FYI	
83 - (FINAID) Financial Aid Approval	Q	LBOULANGER	Lauren Boulanger	Approve	
84 - (STUDHR) Student HR Approver	Q	SMPHILLIPS	Samantha Myers Phillips	Approve	
85 - (ORIGFY) Originator FYI Completion	Q			FYI	
86 - (STAPPL) Student Payroll Apply	Q	SMPHILLIPS	Samantha Myers Phillips	Apply	
Not Selected	~ Q			Not Selected	~
Not Selected	~ Q			Not Selected	~
Not Selected	~ Q			Not Selected	~
Not Selected	~ Q			Not Selected	~

RSE Routing Queue Example

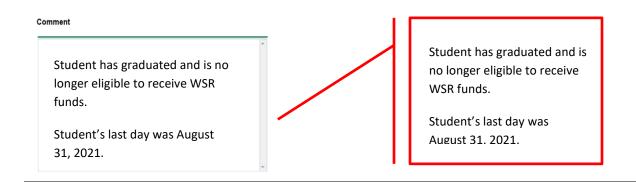
Routing Queue

Approval Level	User Name	Required Action
31 - (STSUP1) Student Supervisor Approver 1		Approve
32 - (STSUP2) Student Supervisor Approver 2		FYI
34 - (STUDHR) Student HR Approver	Q	Approve
35 - (ORIGFY) Originator FYI Completion	۹	FYI
36 - (STAPPL) Student Payroll Apply		Apply
Not Selected	✓ Q.	Not Selected
Not Selected	✓ Q.	Not Selected
Not Selected	✓ Q.	Not Selected
Not Selected	✓Q	Not Selected

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.



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.

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



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

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

* - indicates a required field.

DELETE

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

HOURLY RATE CHANGE FOR WSR/RSE STUDENT EMPLOYEE Accessing the EPAF Menu & Approver Summary

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

This EPAF should only be used to change the hourly rate for a WSR/RSE student employee currently set-up in Banner. <u>It cannot be</u> 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 \bigcirc magnifying glass to search for an employee's 900#.
- 2. The query date will default to today's date. Change the query date to the effective date of the 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

The 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 🗳 🔍		Th
Query Date: MM/DD/YYYY 08/15/2021		ch
Approval Category: Hourly Rate Change for WSR Employee, D000	D56 🗸	08
Go		

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

Employee Job Assignments

Туре	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 🗳 🔍	This student's hourly rate change
Query Date: MM/DD/YYYY+ 09/01/2021	on September 1, 2021. Enter
Approval Category: Hourly Rate Change for WSR Employee, D00056	09/01/2021 in the query date block.
Go	

Employee Job Assignments

Туре	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

J

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.

	ew EPAF Person S			
	Enter an ID, select the link	to search for an ID, or generate an ID. Enter the Query Date and select th	t the Approval Category. Select Go.	
* - i	indicates a required field.			
ID:	Lis	a Weeks Giger 🛛 🗳 🔍		
2.	Date: MM/DD/YYYY	09/01/2021		
Ар	proval Vategory: +	Hourly Rate Change for WSR Employee, D00056	▼	
G	•	Not Selected		
		One Time Payment - Extra Services (Non Academic Affairs), D00007		
Em Typ	ployee Job Assignments De Position Suffix Title	One Time Payment - Extra Services (Academic Affairs), D00008	elLast Paid DatelStatus	
	mary 000376 00 Dire	Termination from DSU (Academic Affairs), D00009	Jul 31, 2021 Active	
	condary 003060 00 WS	Termination from DSU (Non Academic Affairs), D00010	Active	
		Job Labor Distribution Change (Academic Affairs), D00015		
		Job Labor Distribution Change (Non Academic Affairs), D00016	티	
		Campus Address Change (Academic Affairs), D00022		
DEI	LEASE: 8.18	Campus Address Change (Non Academic Affairs), D00023		
REL	LEASE. 0.10	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	Use EPAFs D00056 and D00057 to	
		Termination of RSE Student Position, D00055	change the hourly rate for a student	
		Hourly Rate Change for WSR Employee, D00056	and click "GO".	
		Hourly Rate Change for RSE Employee, D00057		

- 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.

→ C UONIINE Personal Infor Search New EPA	services mation <u>Atumn a</u> AF Job Sele earch for a new p	s://dsub: and Frien Go	Application Navigator anp8ssb01.deltastate.edu:9010 de Otuvient Germees & Finance umber and enter the suffix, or s	0/dsu/bwpkepaf.P_Cho	rinance		× • cov				
Personal Infor Search New EPA There or se	services mation <u>Atumn a</u> AF Job Sele earch for a new p	and Frien Go ection	Student Gennies & Financia Student dennies & Financia umber and enter the suffix, or s	ai Au	rinance						
Personal Infor Search New EPA There or se	AF Job Sele	Go ection	umber and enter the suffix, or s		Timance						
New EPA	earch for a new p	ection		elect the link under Title.							
Enter or se	earch for a new p	position n		elect the link under Title.							
Enter or se	earch for a new p	position n		elect the link under Title.							
				elect the link under Title.							
				elect the link under litle.							
ID·	Line Mo	eks Gine									
Query Date:	Sep 01.	· ·	r,								
			nge WSR Emp, D00056								
	- D-4- (714- D4-										
Search Type				Time Sheet Organization	Start Date	End Date L	ast Paid Date	Status	Select		
Q New J	lob								0		
Prima	ry 000376	00	Director of Human Resources	4113, Human Resource	Nov 16, 2015	J	lul 31, 2021	Active			Select the student's job requiring
									0		an hourly rate change by clicking
Secor	ndary 003060	00	WSR-Human Resources	4113, Human Resource	Jun 01, 2020			Active	۲	•	on the radial button and click GO
All Jobs			<u> </u>	1		L		1			
Next Approva	I Tyle Go										
	\bigcirc										

VIEW EMPLOYEE EMPLOYMENT CLASS

No changes are needed – fields are not enterable

* - indicates a required field.





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	k 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	

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

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 2: Hourly Rate Change

tem	Current Value	New Value	
Job Begin Date: MM/DD/YYYY	06/01/2020		
Jobs Effective Date: MM/DD/YYYY	k 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		
TE: (Not Enterable)	1	.25	
Job Change Reason: \star		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.

Delta State

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.

Update Labor Distr Current Effective Date: 08/01/2 COA Index Fund Orga New Effective Date: MM/DI	2021 anization Acco	ount Program A		ate	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 F	und 310403		Account 62800	Program	Activity	Location	Project	Cost	Percent Encumbrance Ove	erride End Date Remove
	ave and Add Nev							Total:		Change this percentage to 0.00 and click on Save and Add New Rows.
Current Effective Date: 08/01/2021 COA Index Fund Organiza	tion Account Pro	ogram Activity Lo	cation Project C	Cost Percent End	umbrance Overri	de End Date				
New Effective Date: MM/DD/YY	YY 08/01/2021									
COA Index Fund	Organi: 0403 Q 411:	zation Account 3 G2800	Program	Activity	Location P	roject Cos	t Percent E	Encumbra	nce Override End Date Remove	
		ू द द द				[

- 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

opua		istributions,	003000-00 11	Six-riuman r	resources													
Currer																		
	ve Date: 08/																	
COA	ndex Fund C	Organization Ac	count Program	Activity Locat	ion Project Cos	t Percent Encu	mbrance Ov	erride End D	ate									
New																		
	ve Date: MN	DD/YYYY 08/	01/2021															
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Ov	verride End Date Re	move					
۹ 1		Q 310403	Q 4113	62800	Q 0605	Q.				.00								
													0					
۹ 1		310405	4113	62800	Q 0605	Q				100.00								
													U					
٩.		9	Q.	9	9	Q.								_				
		۹.	<u></u>	<u>م</u>	Q	○												
٩.		۹.	Q	○	9	Q								En	ter COA, F	und #, Org	j#, and	
٩.		۹.	۹.	۹.	9	<u>م</u>								۵c	count# and	d nercenta	ae	
									Total:	100.00							-	
										100.00				Be	sure perce	entages = '	100%.	
Defau	t from Intex	Save and Add	New Rows							-					-	_		

- **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.

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: MN	//DD/YYYY 08/	01/2021											
COA Index	Fund 310403	Organizatio	n Account 62800	Program	Activity	Location	Project	Cost	Percent Encumbrance	e Override End Date	Pomove V	Click the remove	e button on
Q 1	Q 310405	4113	62800	Q 0605					100.00			the line that has entered. Then cl	
م م	م م			Q								and Add New Ro	
Q	Q Q												
Default from held	Come and Add	New David						Total:	100.00				
Default from Index	Save and Add	New Rows	\leftarrow										

Update Labor Distributions, 003060-00 WSR-Human Resources

Current Effective Date: 0 COA Index Fund		ccountProgram	Activity Loca	tion Project Co	ost Percent End	umbrance Ov	erride End D	Date		
New Effective Date: N										
COA Index	Fund 310405	Organization	Account 62800	Program		Location	Project	Cost	Percent 100.00	Encumbrance Override End Date Remove
] Q] Q] Q							
Default from Index	Save and Add	New Rows							100.00	

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: <u>Add the approver STGRAN (Student Grants Approval)</u>. 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	Us	er Name			I	Required Act	ion Remo
81 - (STSUP1) Student Supervisor Approver 1	Q					Approve	
82 - (STSUP2) Student Supervisor Approver 2	Q					FYI	
83 - (FINAID) Financial Aid Approval	Q	LBOULANGER	La	uren Boulanger		Approve	
84 - (STUDHR) Student HR Approver	Q	SMPHILLIPS	Sa	mantha Myers Phillips		Approve	
85 - (ORIGFY) Originator FYI Completion	Q					FYI	
86 - (STAPPL) Student Payroll Apply	Q	SMPHILLIPS	Sa	mantha Myers Phillips		Apply	
Not Selected	~ Q					Not Selected	~
Not Selected	~ Q					Not Selected	~
Not Selected	~ Q					Not Selected	~
Not Selected	~ Q					Not Selected	~
Save and Add New Rows							

RSE Routing Queue Example

Routing Queue

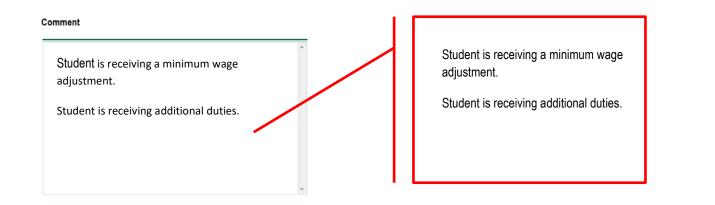
Approval Level	User Name	Required Action
81 - (STSUP1) Student Supervisor Approver 1	٩	Approve
82 - (STSUP2) Student Supervisor Approver 2	٩,	FYI
84 - (STUDHR) Student HR Approver	٩	Approve
85 - (ORIGFY) Originator FYI Completion	٩,	FYI
86 - (STAPPL) Student Payroll Apply	٩,	Apply
Not Selected		Not Selected

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.



SAVE EPAF

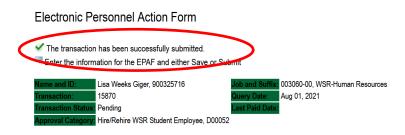
- Hit the "Save" Button at the bottom of the form.
- Return to the top of the form.
- The message should display "Your change was saved successfully."
- Check your date entry

Electronic Personnel Action Form

as saved successfully nation for the EPAF and either Sav	ve or Submit	
 Lisa Weeks Giger, 900325716 15870 Waiting Hire/Rehire WSR Student Employee elete	Query Date: Last Paid Date:	003060-00, WSR-Human Resources Aug 01, 2021

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.



ERROR AND WARNING MESSAGES

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

Warnings are acceptable.

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

indicates a required field

DELETE

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

UPDATE LABOR DISTRIBUTIONS Accessing the EPAF Menu & Approver Summary

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

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

- 1. Enter the employee's 900# or click on the \bigcirc magnifying glass to search for an employee's 900#.
- The query date will default to today's date. Change the query date to the 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
- 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.

Steps to change Labor Distributions

box.

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

Update Labor D Current Effective Date: 06 COA Index Fund New Effective Date: M	3/01/2021 Organization Ac	ccount Program		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 or the date the new grant year starts: Example: 08/01/2021						
COA Index	Fund 310403 9 9 9 9 9 9 9 9 9 9 9 9	Organization	Account	Program Q 0605 Q Q Q Q Q Q	Location	Project	Cos		Override End	Date Remove Change this percentage to 0.00 and click on Save and Add New Rows.
					 Delta	State Ur	niver	sity Electronic Per	sonnel Act	ion Forms 40

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												
lew ffecti	ve Date: M	M/DD/YYYY 08/	01/2021									
COA	Index	Fund		Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Dat	eRemov
۹ ۱		310403	Q 4113	Q 62800	Q 0605	Q				.00		
		9	9	Q	Q	9						
~		9	Q.	9		Q						
~		9	Q	9	9	9						
~		Q	Q	Q		9						
									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

	Date: 08/01/2021 x Fund Organizati	on Account Progr	am Activity Loca	tion Project Co	st Percent Encu	umbrance Ov	erride End Da	ite					
New Effective	Date: MM/DD/YYY	Y 08/01/2021											
COA II	ndex Fund		ion Account	Program	Activity	Location	Project	Cost	Percent .00	Encumbrance	Override End Date	Remove	
۹1	Q 310	405 4113	Q 62800	Q 0605					100.00]		
d d 0 d d 0	م م م م				م م م م			Total:]]]		Enter COA, Fund #, Org#, and Account# and percentage.
Default fro	om Intex Save and	Add New Rows	>						100.00				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 DateProvive	
	Click the remove button on the line that has 0.00%
	entered. Then click on "Save and Add New Rows.
Default from Indk Save and Add New Rows	
Update Labor Distributions, 003060-00 WSR-Human Resources Gurrent	
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 DateRemove 1 9 310405 9 4113 9 62800 9 0605 9 100.00	9
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: <u>Add the approver STGRAN (Student Grants Approval)</u>. 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	٩		Approve	
82 - (STSUP2) Student Supervisor Approver 2	٩,		FYI	
83 - (FINAID) Financial Aid Approval		Lauren Boulanger	Approve	
84 - (STUDHR) Student HR Approver		Samantha Myers Phillips	Approve	
85 - (ORIGFY) Originator FYI Completion	٩		FYI	
86 - (STAPPL) Student Payroll Apply		Samantha Myers Phillips	Apply	
Not Selected	~ Q		Not Selected	~
Not Selected	~ Q		Not Selected	~
Not Selected	✓ Q.		Not Selected	~
Not Selected	✓ Q.		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	٩	Approve
82 - (STSUP2) Student Supervisor Approver 2	۹	FYI
84 - (STUDHR) Student HR Approver	٩	Approve
85 - (ORIGFY) Originator FYI Completion	٩	FYI
86 - (STAPPL) Student Payroll Apply	۹	Apply
Not Selected ~		Not Selected
Not Selected ~		Not Selected
Not Selected ~		Not Selected
Not Selected ~		Not Selected V

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.

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 Vour change was saved successfully. Enter the information for the EPAF and er Save or Submit Lisa Weeks Giger, 900325716 003060-00, WSR-Human Resources 15870 Aug 01, 2021 Waiting 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



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.

EPAF APPROVER Accessing the EPAF Menu & Approver Summary

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

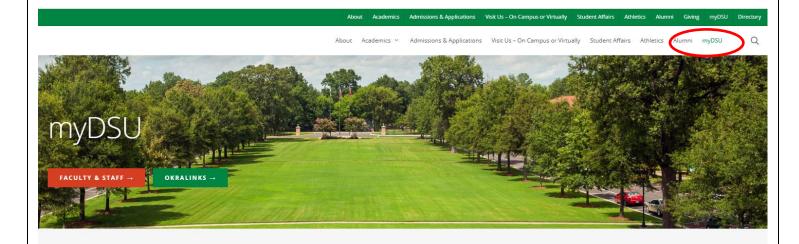
Accessing EPAF menu in DSU Online Services

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

Accessing Employee Self Service through DSU Online Services

Employee Self Service can be accessed through the DSU website:

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



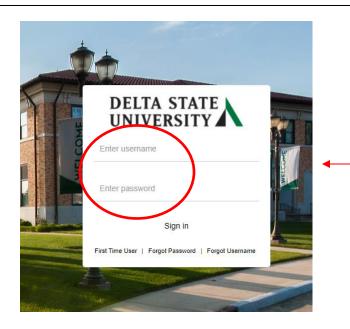
DSU Online is a convenient way to take care of business online for Faculty, Staff, and Students. Within DSU Online students can register for classes, check grades, view unofficial transcripts, pay for tuition, and more. Faculty members can advise students, post grades, view advisees transcripts and more.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





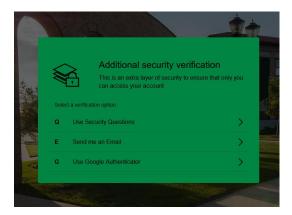
Canvas is the University's new learning management system (LMS). All online courses and content will be delivered from Canvas beginning June 2013. For additional resources and assistance with Canvas please visit more information.



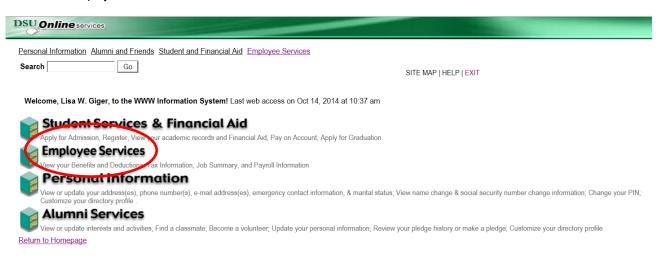


Enter your username and password and click sign-in.

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.



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.

	details of the tr	ansaction.						
ueue Status: All Go Pending - Go								
		New EPAF	Update Proxies Search Proxy or Superuser or Fil	ter Transactions				
			Return to EPAF Menu					
Select All Reset Save 1 25 of 31 N ext ⊕								
PAF Transactions		A -			0.5%			2
PAF Transactions	≜ ID ⊽	▲ Transaction ▼	Type of Change	A Submitted Dat	e ≜ Effective Date	A Required Acti	io Action	Links
PAF Transactions		Transaction	Type of Change			Approve	Action	
Imp to Bottom PAF Transactions A Name Conovan, Rylee C. Donovan, Rylee C. Assistant Professor of Art, 000003-00	~	144	▼	▼	▼	▼	Action	L nks Commen
AFF Transactions Name Donovan, Rylee C. Donovan, Rylee C.	900114402	144	Campus Address Change (Academic Affairs) Job Labor Distribution Change (Academic	Oct 27, 2014	Oct 27, 2014	Approve	io Action	<u>Commen</u>

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

ump to Bottom PAF Transactions								
A Name	↓ ID	A Transaction ▼	▲ Type of Change ▼	A Submitted Date ▼	A Effective Date ▼	A Required Actio ▼	Action	links
Donovan, Rylee C.	900114402	144	Campus Address Change (Academic Affairs)	Oct 27, 2014	Oct 27, 2014	Approve	2	omments)
<u>)onovan, Rylee C.</u> Assistant Professor of Art, 000003-00	900114402		Job Labor Distribution Change (Academic Affairs)	Oct 27, 2014	Dec 01, 2014	Approve		omment
<u>lonovan, Rylee C.</u> Assistant Professor of Art, 000003-00	900114402	54	Salary and Title Change - Staff (Current Position)	Oct 08, 2014	Sep 01, 2014	Approve	2	Comment: Varnings
onovan, Rylee C.	900114402	48	Campus Address Add/Change - Faculty	Oct 07, 2014	Oct 07, 2014	Approve	2	omment
<u>iiger, Lisa W.</u> Miscellaneous Position-Fund 25, 004025- 0	900325716	111	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Nov 01, 2014	Approve	2	omment Varnings
s <mark>iger, Lisa W.</mark> HR Workshop III, 004026-00	900325716	110	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Oct 20, 2014	Approve	2	Comment
Gunn, Jesse C. PT Instructor / Gen Acad Instr, 000458-00	900114407	81	Adjunct New Hire	Oct 13, 2014	Oct 13, 2014	Approve	•	Comme Varnings
Hope, Morgan F.	900114408		Terminate Employee Job Only (Academic	Oct 27, 2014	Oct 27, 2014	Approve		omment

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

	EPAF Approver Summary
٢	Current In My Queue History ✓ 2 transaction(s) processed successfully.
	Select the link under Name to access details of the transaction.
	Queue Status: All Go

Reviewing Your Work before Approving:

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

∆ Name			▲ Type of Change	A Submitted Date	A Effective Date	A Required Action	Action	l inke
V Name	v						Action	Links
<u>Donovan, Rylee C.</u> Assistant Professor o ^r Art, 000003-00	900114402	54	Salary and Title Change - Staff (Current Position)	Oct 08, 2014	Sep 01, 2014	Approve		<u>Comments</u> Warnings
Donovan, Rylee C.	900114402	48	Campus Address Add/Change - Faculty	Oct 07, 2014	Oct 07, 2014	Approve		Comments
<u>Giger, Lisa W.</u> Miscellaneous Position-Fund 25, 004025- 00		111	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Nov 01, 2014	Approve		<u>Comments</u> Warnings
<u>Giger, Lisa W.</u> HR Workshop III, 004026-00		110	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Oct 20, 2014	Approve		Comments
<u>Gunn, Jesse C.</u> PT Instructor / Gen Acad Instr, 000458-00	900114407	81	Adjunct New Hire	Oct 13, 2014	Oct 13, 2014	Approve		<u>**Comments</u> Warnings
<u>Hope, Morgan F.</u> Financial Aid Counselor, 000452-00	900114408		Terminate Employee Job Only (Academic Affairs)	Oct 27, 2014	Oct 27, 2014	Approve		Comments
<u>Hope, Morgan F.</u> 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 Transaction: 54 Transaction Status: Pending Approval Category: Salary and Title Change - Staff (Current Position) Next ↔ 	Job and Suffix: 000003-00, Assistant Professor of Art Query Date: Oct 08, 2014 Last Paid Date:), SALCHS
Approve Disapprove Return for Correction More Info	Add Comment
Here you can see the routing information used to route this EPAF a comments entered by the originator and who the originator is.	ind what action is still pending to be completed. You can see the
Routing Queue	

Routing C	Queue							
Approval I	Level Na	ime	Red	uired Action	Que	ue Status	Action	Date
Human Re	sources, 90 Lis	a Weeks Giger, LGIGER	Арр	rove	Pen	ding		
Superuser,	99 Lis	a Weeks Giger, LGIGER	. Арр	ly	In th	e Queue		
Transacti	on History							
Action	Date	User Name						
Created:	Oct 08, 201	4 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.

Submitted: Oct 08, 2014 Lisa Weeks Giger

	Name	Required Action	Queue Status	Action Date	
luman Resources, 90	Lisa Weeks Giger, LGIGER	Approve	Pending		
Superuser, 99	Lisa Weeks Giger, LGIGER	Apply	In the Queue		
ransaction Histor	y				
Action Date	User Name				
Created: Oct 08,	2014 Lisa Weeks Giger				
Submitted: Oct 08,	2014 Lisa Weeks Giger				
		Approval Ty	pes <u>Account C</u>	istribution Er	rrors Comments Routing Queue Transaction History
Approve Disap	rove Return for Correction	on More Info	Add Comn	nent	
			-		
Vext ອ					

In My Queue Link

Displays transactions that with the following statuses:

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

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

Enter Changes	Current 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		
		ram Activity Location Pro	ject Cost Percent Encumbrance Override En
	ganization Account Progr		
COA Index Fund Org	ganization Account Progr		ject Cost Percent Encumbrance Override Enc
COA Index Fund Org	ganization Account Progr		
COA Index Fund Org	ganization Account Progr		
COA Index Fund Org	ganization Account Progr		
COA Index Fund Org 1 10 300 New Effective Date: 10/08	yanization Account Progr 6 61200 0101 /2014		100.00
COA Index Fund Org 1 10 300 New Effective Date: 10/08	yanization Account Progr 6 61200 0101 /2014		
COA Index Fund Org 1 10 300 New Effective Date: 10/08	yanization Account Progr 6 61200 0101 /2014 yanization Account Progr	ram Activity Location Pro	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.