



Guide to EPAFs with Banner HR

Published by
Department of Human Resources

Acknowledgements

The Department of Human Resources gratefully acknowledges many individuals for their contributions to the design of EPAF.

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A special thanks and appreciation goes out to **Jane Lewis** in Human Resources for her leadership in designing and delivering the EPAF training program and documentation.

Also, many thanks to the Departments who participated in our Test Pilot Group.

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1 Introduction

1.1 EPAF Defined

An **E**lectronic **P**ersonnel **A**ction **F**orm, called **EPAF**, is an online form originated by the department to communicate an employment decision about an employee to the Payroll Department. All employment decisions require the attention of Human Resources, and require the employees' Human Resources Information System (HRIS) file to be updated. The department is required to fill out a form that specifies the nature and details of the employment decision.

Common examples of employment decisions requiring an EPAF include:

- Hire a new employee
- Transfer an employee from one department to another
- Give an employee a pay or merit increase
- Change the labor distribution of the employee's job
- Add an assignment to the employee's job records

There are many more **Job Change Reasons**. Refer to a complete list in the Appendix of this guide.

Each job change must be approved on various levels. All EPAFs require department and division approval. Each EPAF is assigned an "Approval Category" that determines the required levels of approval. The final approval of the EPAF is through the Payroll Department, and the EPAF is applied to the employee's job record. If there are any problems with the EPAF, a designated Approver can select **Return for Correction** and require the originator to correct or recreate the EPAF.

The EPAF must be completed, approved, and applied in a timely manner so the employees' job record can be updated. Timely completion of an EPAF is essential to help the Payroll Department pay an employee accurately and on time. For a complete EPAF Submission Schedule, please review the Bi-weekly Web Time Entry Calendar.

1.2 Advantages of EPAF:

- Accountability for data entry is shifted to the originator
- Speed and efficiency of the process is increased
- Less opportunity for data entry errors
- Ability to track a transaction through the approval queue
- Scanning documents instead of mailing them
- Speed of processing

1.3 EPAF Access

In order to access, create, or originate EPAFs, a user must confirm that they have signed the Confidentiality Agreement and completed the FERPA Training. Once the application is processed and approved, the user can follow these steps to access EPAF:

Log into **Inside Pacific**, select the **Administrative Tab, Administrative Services Tab**, and then **Employee Tab**. Select **EPAF Main Menu**.

1.4 EPAF Support

Q: What information should I have available when originating an EPAF?

A: You should know:

- the employee's Banner ID number;
- which Approval Category to use;
- the position number (six-character code) on which action is being taken;
- the date the action or change (hire, promotion, leave, etc.) will occur;
- if it's a change, the elements of the employee's record that are changing (example: salary, E-class);
- and who will approve this request in the department and the University.

Q: What if I don't have an employee's Banner ID? How do I start the EPAF?

A: You can query the employee's name in the ID field. Their new nine-digit Banner ID will then be displayed in the field. For a new hire, contact the appropriate Human Resources for the employee's Banner ID. Human Resources must first set up the person in Banner, or you will not be able to hire them.

Q: What is the Query Date on the EPAF and what do I enter in this field?

A: Getting your Query Date right is one of the keys to EPAF success! In general, the **Query Date** is the date the action or change needs to occur on the employee's personnel record. Please note that effective dates must occur after the employee's Last Paid Date, so refer to the payroll calendar when entering a Query Date. If your effective date in the body of the EPAF does not match your Query Date, you may encounter an error and have to start over. Examples:

- **New Hire:** If this EPAF initiates the hiring of a new employee, use the first day of work as the Query Date.
 - **Salary Increase / Title Change:** Use the effective date of the change as the Query Date. Use actual date of change in Personnel Date Field.
 - **Labor Distribution Change:** Use the effective date of the change as the Query Date. If the Labor Distribution should have changed in a previous pay period, use the first day of the current pay period as the Query Date. Use actual date of change in Personnel Date Field. Note that you will have to do a Labor Redistribution for the previous pay period(s).
 - **Employment Termination:** If the EPAF is generated to terminate employment, use the last day that the employee should receive pay as the Query Date. A job can be terminated on an employee's last paid date.
 - **End Job Assignment:** Use the last day the employee will work in the job as the Query Date.
 - **Promotion/Transfer:** Use the first day the employee will work in the new job as the Query Date.
 - **One Time Payment/Recurring:** Use the first day of the pay period for which you want to pay this employee as the Query Date.
-

Q: What do the different date fields in the EPAF mean?

A: The different date fields are as follows:

- **Job Begin Date:** The date the employee begins or began in this job. If updating an existing record, use Current Value in the New Value field.
 - **Job Effective Date:** The date the change in the EPAF will take effect. The effective date cannot be before the Last Paid Date (indicated at the top of the EPAF). For a new hire, enter the employee's start date.
 - **Personnel Date:** The actual date the job change occurred. This may be different from the effective date if an EPAF is not completed within the pay period of the job change.
-

2 Select New EPAF

For a new EPAF, select "New EPAF". If you are an Approver and need to check if you have EPAFs to approve, select "EPAF Approver Summary". If you are the Originator of an EPAF, select "EPAF Originator Summary" to view all your EPAFs.

- 
-  [EPAF Approver Summary](#)
 -  [EPAF Originator Summary](#)
 -  [New EPAF](#)
 -  [EPAF Proxy Records](#)
 -  [Act as a Proxy](#)

After accessing EPAF, follow the Steps to Creating an EPAF for Student, Staff or Faculty Assignments in the sections that follow.

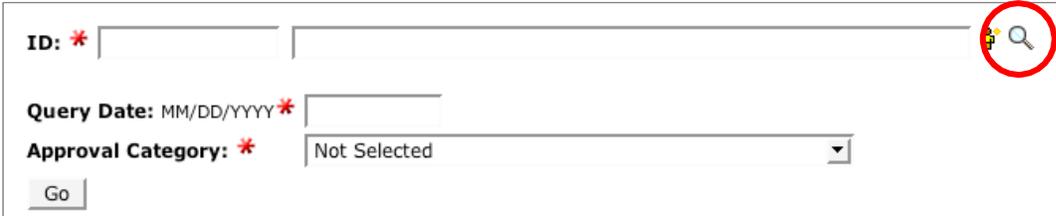
3 EPAFs for Student Assignments

The following pages describe the steps required to originate and submit an EPAF for a Student Assignment:

- Step 1: New EPAF Person Selection
- Step 2: Job Selection
- Step 3: Main Job Information
- Step 4: Labor Distribution / FOAP
- Step 5: Approval Routing Queue
- Step 6: Comments
- Step 7: Save & Submit

Step 1 and 2 are the foundations of the EPAF. All of the other steps can be modified during the EPAF creation process or after an EPAF has been returned for correction – except Steps 1 and 2. So, it's important to be accurate.

Step 1: New EPAF Person Selection



The screenshot shows a web form for 'New EPAF Person Selection'. It contains three main input fields: 'ID: *' with a search icon to its right, 'Query Date: MM/DD/YYYY *', and 'Approval Category: *' with a dropdown menu currently set to 'Not Selected'. A 'Go' button is located at the bottom left of the form area.

Begin by searching for the employee for whom the EPAF is being created. If the person is already an employee of the University, simply type his or her ID# into the ID field. If it is not known if the person is an employee, then search the employee data base.

Note: All Pacific students will already be assigned a Pacific ID number and you must use the existing number, do not create a new one.

Next, input the Query Date. Determine the Query Date by following general guidelines:

If this EPAF creates a new assignment for a new-hire or re-hire, use the start date of employment. For all other EPAFs, use the first day of the pay period in which the Payroll Department is accepting EPAFs. If this EPAF terminates an assignment, use the last day of the employee's final pay period.

Approval Category

The Approval Category determines which employment decision most appropriately fits the required EPAF approval. There are several general types of EPAFs. The body of the EPAF populates based upon the selected Approval Category. The Approval Category also determines which levels are required for EPAF approval. Select the Approval Category that most appropriately fits the type of EPAF that is being created.

Step 2: Job Selection



New Job
Position: 
Suffix:

New Job – Type in a new position number and suffix if the EPAF creates a brand new assignment for the employee. The suffix differentiates one job from another within the same position number of the job type. Suffix 01 is used only if second job has the same index. Click “Go” or “All Jobs” to see all jobs for this employee in your Org.

Existing Job – Click on the link of the existing job if the EPAF modifies or continues an existing job in the employee’s record.

Step 3: Main Job Information

Step 3 offers many fields for data entry depending on the Approval Category selected in Step 1. Please see the Appendix of this guide for specific reference for many common types of EPAFs:

- Student Position, Account, and Suffix Numbers
- Student New Hires
- Student Assignments
- Student Retro Salary Adjustment
- Student Assignment Termination
- Student Salary Increase

Step 4: Labor Distribution/FOAP

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

New	
Effective Date: MM/DD/YYYY	05/30/2013

CO A	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date		
1		BCPF	11000	10856		6005	108525					100.00	

All student assignments and new hire EPAFs populate a generic FOAP, and the labor distribution is attached to the position number. The Account number automatically populates with the correlation to the position number entered so it does not need to be retyped. Work Study assignments are charged with a labor distribution split: 25% to the department and 75% to a Federal Work Study grant.

Step 5: Routing Queue

Step 5 determines the individuals who approve the EPAF.
Routing Queue

Approval Level	User Name	Required Action
10 - (HIRMGR) Hiring Manager	<input type="text"/>	Approve
60 - (UNVBUD) University Budget	<input type="text"/>	Approve
70 - (HRAPPR) Human Resources	<input type="text"/>	Approve
80 - (PAYROL) Payroll	<input type="text"/>	FYI
90 - (APPLY) HR Apply	<input type="text"/>	Apply
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

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

Example: (HIRMGR) Hiring Manager – Using the magnifying glass search icon, select the most appropriate Approver from the available users.

There are three possible **Required Actions**:

- Approve** The individual is required to “approve” the EPAF. The EPAF cannot be approved at a higher level until is it is approved at lower levels.
- Apply** Only an individual at the HR level can “apply” an EPAF. This is the action that occurs when an EPAF turns into a jobs record in the Banner payroll system.

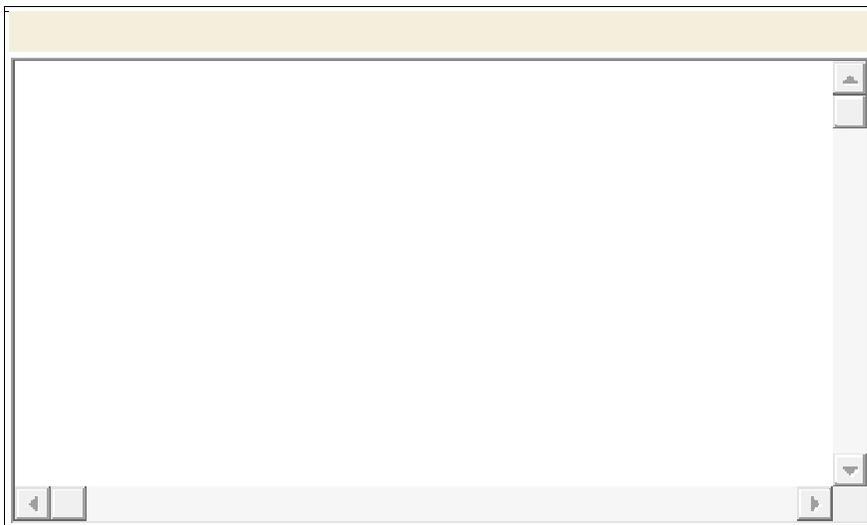
FYI

An EPAF originator can select additional individuals at different levels to “FYI” or “acknowledge” the EPAF. Unlike the required action to “approve,” an EPAF can be approved and applied at higher levels if the EPAF Approver doesn’t perform the required action of “FYI”.

Tip: If someone would like to have viewing access to the EPAF, indicate their name as an FYI. Only registered EPAF users can receive an FYI of an EPAF.

Step 6: Comments

Comment



Include any pertinent details about the EPAF in the Comments.
For Example: Name of WTE Supervisor and if Background Check was complete.
What about estimated Hours/week that the student will work?

Important: Once comments are “saved”, they cannot be changed. Any comments can be attached to the EPAF at any Approval level.

Step 7: Save and Submit

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

ERROR Error messages will not allow the EPAF to progress to the approval levels. Errors must be corrected. Read the details provided, and correct the errors as indicated.

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

When an EPAF is **Successfully Applied**, the originator will receive a confirmation E-mail. If an EPAF is **Returned for Correction**, the originator will receive an alert E-mail. The originator must log into the **EPAF Originator Summary** to view, void, update, or re-submit the EPAF.

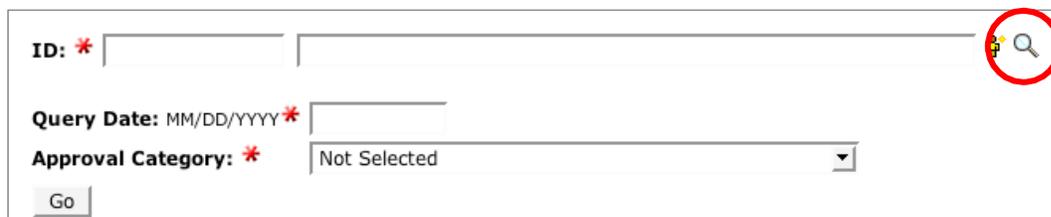
4 Faculty and Staff Assignments

The following pages describe the steps required to originate and submit an EPAF for Faculty or Staff Assignments:

- Step 1: New EPAF Person Selection
- Step 2: Job Selection
- Step 3: Main Job Information
- Step 4: Labor Distribution/
FOAP
- Step 5: Approval Routing
Queue
- Step 6: Comments
- Step 7: Save & Submit

Step 1 and 2 are the foundations of the EPAF. All of the other steps can be modified during the EPAF creation process or after an EPAF has been returned for correction – except Steps 1 and 2. So, it's important to be accurate.

Step 1: New EPAF Person Selection



The screenshot shows a web form for selecting a person for an EPAF. It contains three main input fields: 'ID: *' with a text input box, 'Query Date: MM/DD/YYYY *' with a date input box, and 'Approval Category: *' with a dropdown menu currently showing 'Not Selected'. A 'Go' button is located at the bottom left. A red circle highlights a magnifying glass icon in the top right corner of the form area.

Begin by searching for the employee for whom the EPAF is being created. If the person is already an employee of the University, simply type his or her ID# into the ID field. If it is not known if the person is an employee, then search the employee data base.

Next, input the Query Date. Determine the Query Date by following general guidelines:

If this EPAF creates a new assignment for a new-hire or re-hire, use the start date of employment. For all other EPAFs, use the first day of the pay period in which the Payroll Department is accepting EPAFs. If this EPAF terminates an assignment, use the last day of the employee's final pay period. The Personnel Date will always reflect the true date of employment change.

Query Date

Next, input the Query Date. Determine the Query Date by following these general guidelines:

New Hire

If this EPAF initiates the hiring of a new employee, use the first day of work as the Query Date. For faculty, use the first day of the pay period for which they will be paid.

Salary Increase / FOAP Change / Title Change

Use the effective date of the change as the Query Date (usually the first day of the pay period). **Important:** Even if the EPAF is for a retroactive change to an existing job, use the first day of the current pay period as the **Query Date**.

Assignment Termination

If the EPAF terminates the employee's assignment (not employment), use the last day of work as the Query Date.

Employment Termination

If the intent of the EPAF is to terminate the faculty or staff member's employment with UOP, use the last day that the employee should receive pay as the Query Date.

Transfer

If an employee is transferring from one department to another, two EPAFs are required:

1. Termination of Assignment – terminates the current position. Use the last day worked on the current assignment as the Query Date.
2. Staff Assignment Transfer – creates a new assignment. Use the start date of the new assignment as the Query Date.

Note: To avoid a break in service, the date of assignment termination must be exactly the day before the initiation of the new assignment (even if these days fall on a holiday or weekend).

Approval Category

The Approval Category determines which employment decision most appropriately fits the required EPAF approval. There are several general types of EPAFs. The body of the EPAF populates based upon the selected Approval Category. The Approval Category also

determines which levels are required for EPAF approval. Select the Approval Category that most appropriately fits the type of EPAF that is being created.

Step 2: Job Selection



The screenshot shows a web form titled "New Job". It contains two input fields: "Position:" and "Suffix:". The "Position:" field is larger and includes a magnifying glass icon on the right side. Below the "Suffix:" field is a "Create" button.

New Job – Type in a new position number and suffix if the EPAF creates a brand new assignment for the employee. The suffix differentiates one job from another within the same position number of the job type. Suffix 01 is used only if second job has the same index. Click “Go” or “All Jobs” to see all jobs for this employee in your Org.

Existing Job – Click on the link of the existing job if the EPAF modifies or continues an existing job in the employee’s record.

About Position Numbers:

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

Position numbers are created by the budget management function. Contact your HR Rep if a new position number needs to be created.

Suffix:

If an employee has more than one assignment under the same position number, assign a suffix that is not connected to an existing job. To ensure this, click on All Jobs, under Existing Jobs. Survey the jobs in the employee’s record, and assign a suffix not in use. For example, if 00 and 01 have been used, assign suffix 02 to the newly created job.

Existing Jobs:

Click on the link of the existing job if the EPAF modifies or continues an existing job in the employee’s record.

Step 3: Main Job Information

Step 3 offers many fields for data entry depending on the Approval Category selected in Step 1. Please see the Appendix of this guide for specific reference for many common types of EPAFs:

- Faculty New Hire
- Employee E-Class Transfer
- Staff Assignments
- Staff/Faculty Retro Adjustment
- Staff/Faculty Stipend
- Staff/Faculty Salary Increase

Step 4: Labor Distribution/FOAP

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

New												
Effective Date:		<input type="text"/>										
MM/DD/YYYY												
CO A	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override End Date
1	<input type="text"/>	FTM	110001	30045	<input type="text"/>	6052	30080	<input type="text"/>			100.0	
<input type="text"/>												
<input type="text"/>												
<input type="text"/>												
<input type="text"/>												
										Total:	100.00	

All student assignments and new hire EPAFs populate a generic FOAP, and the labor distribution is attached to the position number. The Account number automatically populates with the correlation to the position number entered so it does not need to be retyped.

Step 5: Routing Queue

Step 5 determines the individuals who approve the EPAF.

Routing Queue

Approval Level	User Name	Required Action
10 - (HIRMGR) Hiring Manager	<input type="text"/>	Approve
60 - (UNVBUD) University Budget	<input type="text"/>	Approve
70 - (HRAPPR) Human Resources	<input type="text"/>	Approve
80 - (PAYROL) Payroll	<input type="text"/>	FYI
90 - (APPLY) HR Apply	<input type="text"/>	Apply
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected
Not Selected	<input type="text"/>	Not Selected

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

Example: (HIRMGR) Hiring Manager – Using the magnifying glass search icon, select the most appropriate Approver from the available users.

There are three possible **Required Actions**:

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

- Apply** Only an individual at the HR level can “apply” an EPAF. This is the action that occurs when an EPAF turns into a jobs record in the Banner payroll system.
- FYI** An EPAF originator can select additional individuals at different levels to “FYI” or “acknowledge” the EPAF. Unlike the required action to “approve,” an EPAF can be approved and applied at higher levels if the EPAF Approver doesn’t perform the required action of “FYI”.

Tip: If someone would like to have viewing access to the EPAF, indicate their name as an FYI. Only registered EPAF users can receive an FYI of an EPAF.

Step 6: Comments

Comment

Include any pertinent details about the EPAF in the Comments.
For Example: Name of Supervisor and if Background Check was complete.

Important: Once comments are “saved”, they cannot be changed. Any comments can be attached to the EPAF at any Approval level.

Step 7: Save and Submit

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

- ERROR** Error messages will not allow the EPAF to progress to the approval levels. Errors must be corrected. Read the details provided, and correct the errors as indicated.
- Warning** Warning messages simply deliver information, and allow the EPAF to progress successfully. Usually, warning messages inform the originator, approvers, and payroll department about budget issues associated with the job.

When an EPAF is **Successfully Applied**, the originator will receive a confirmation E-mail. If an EPAF is **Returned for Correction**, the originator will receive an alert E-mail. The originator must log into the **EPAF Originator Summary** to view, void, update, or re-submit the EPAF.

5 EPAF Originator Summary

Log into [Inside Pacific](#), select the Administrative Tab, Administrative Services Tab, and then Employee Tab. Select EPAF Main Menu.

The EPAF Originator Summary lists EPAFs that the Originator (or Hiring Manager) has created, voided, saved, or submitted.

It also contains EPAFs that have been Returned for Correction and require the Originator's attention.



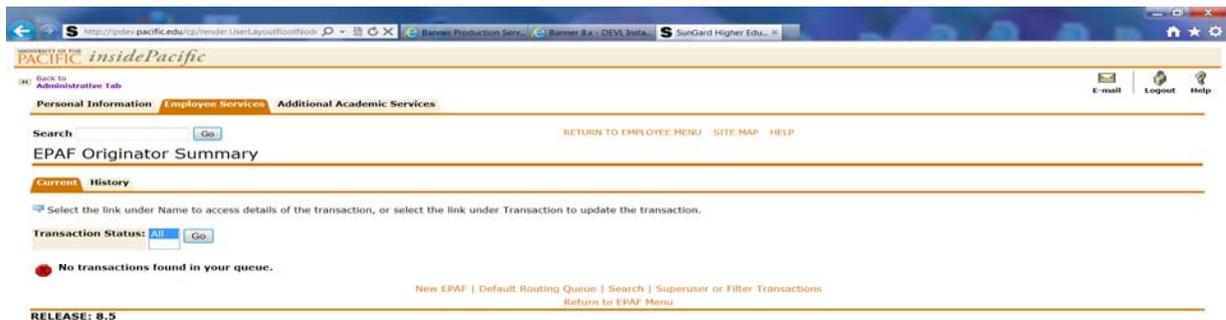
To access the Originator Summary, select "EPAF Originator Summary".

If you are an Approver and need to check if you have EPAFs to approve, select "EPAF Approver Summary".

If you are the Originator of an EPAF, select "EPAF Originator Summary" to view all your EPAFs.

Within the EPAF Originator Summary, there are two tabs:

Current and History.



5.1 Current Tab

The Current Tab is similar to an "inbox" for the EPAF Originator.

Waiting Status

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

Returned for Correction Status

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

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

Update.

Example:

EPAF Preview

You are acting as an Originator.

Name and ID: [Redacted] **Job and Suffix:** B59999-00, Human Resources
Transaction: 5908 **Query Date:** Aug 21, 2008
Transaction Status: Return for Correction **Last Paid Date:** Jul 20, 2008
Approval Category: Student Assignments, STUASG

Previous

 [Update](#) | [Add Comment](#)

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

Click **Update** to make any changes to the EPAF.

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

5.2 History Tab

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

Current **History**

EPAF Transactions

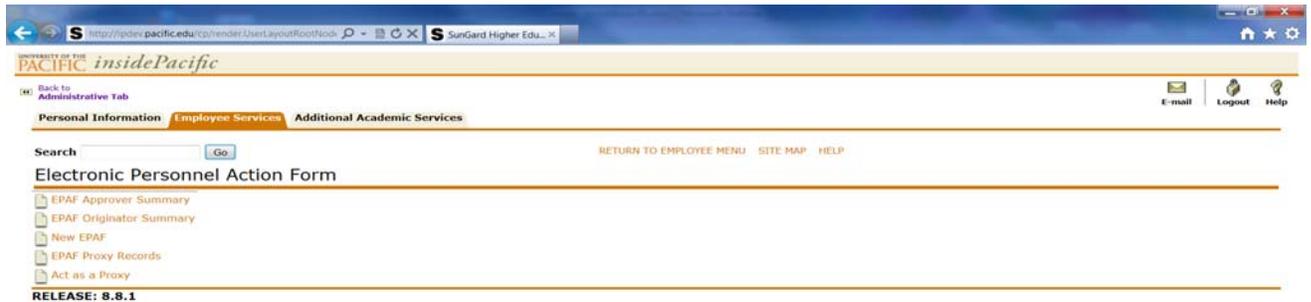
Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status
[Redacted], B59999-00	[Redacted]	5906	Student Assignments	Aug 04, 2008	Aug 21, 2008	Pending
[Redacted] 996-01	[Redacted]	5905	SH Staff Labor Distribution	Aug 04, 2008	Aug 21, 2008	Pending
[Redacted] Jade Human Resources, B59999-00	[Redacted]	5904	Student Assignments	Aug 04, 2008	Aug 21, 2008	Pending

1 - 3 of 3

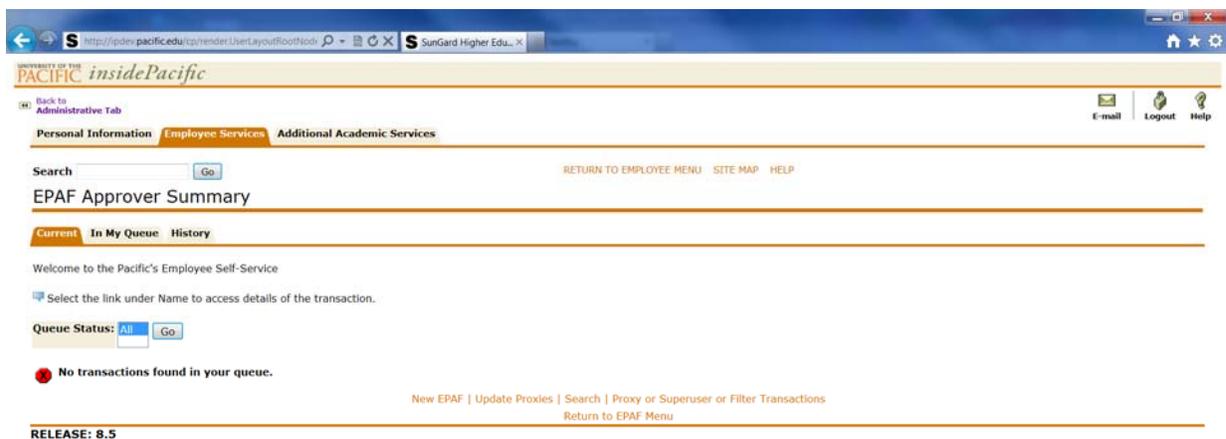
6 Approving EPAFS

The EPAF Approver Summary contains EPAFs that the need to be approved and sent on.

Log into **Inside Pacific**, select the Administrative Tab, Administrative Services Tab, and then Employee Tab. Select EPAF Main Menu.



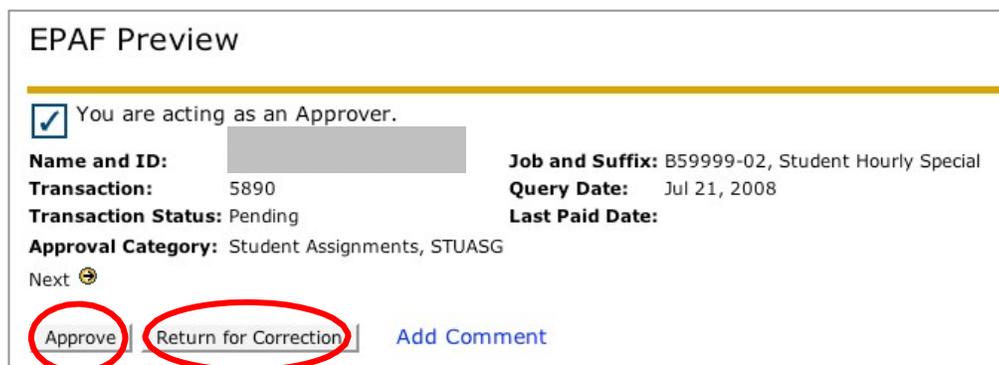
Current Tab is your "In-Box", the In My Queue Tab shows epafs that are pending for another Approver to submit to you, and History Tab shows epafs that have been Approved by you and submitted to the next level.



Current Tab

The Current Tab is similar to an "inbox" for the EPAF Originator. The EPAF can be approved two ways. First, check the "Action" box next to each EPAF to be approved. Then click Save.

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



The screenshot shows the 'EPAF Preview' interface. At the top, there is a yellow bar with a checked box and the text 'You are acting as an Approver.' Below this, the form displays the following information:

Name and ID:	[Redacted]	Job and Suffix:	B59999-02, Student Hourly Special
Transaction:	5890	Query Date:	Jul 21, 2008
Transaction Status:	Pending	Last Paid Date:	
Approval Category: Student Assignments, STUASG			

Below the information, there is a 'Next' button with a smiley face icon. At the bottom, there are three buttons: 'Approve', 'Return for Correction', and 'Add Comment'. The 'Approve' and 'Return for Correction' buttons are circled in red in the original image.

Approve

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

Return for Correction

Click this button to return the EPAF to the Originator for correction.

IMPORTANT: Approvers who return EPAFs should **Add Comments** to the EPAF indicating the reason for return.

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

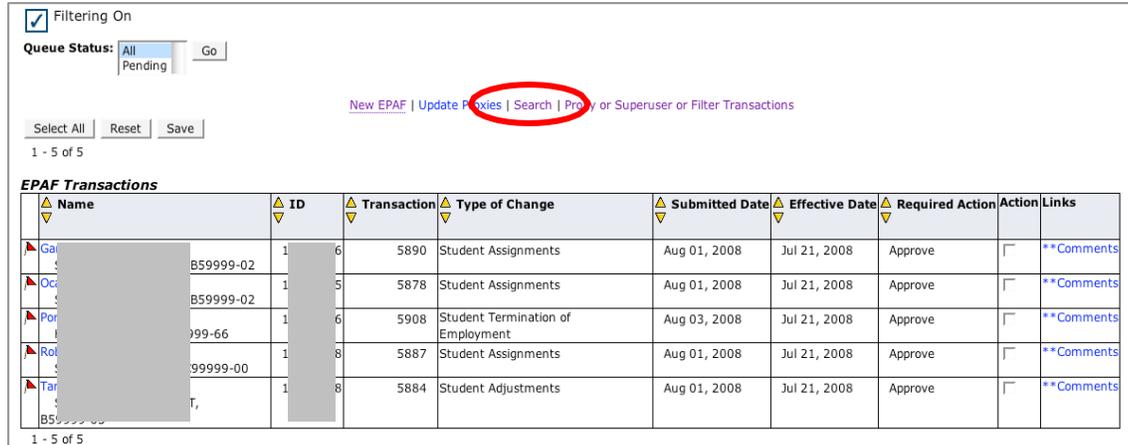
In My Queue

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

History Tab

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

TIP: You may click on the **Search** to find EPAFs by 988#, Employee Name, EPAF Transaction Number, and more.



1 - 5 of 5

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action Links
Gal...	B59999-02	1 6	5890 Student Assignments	Aug 01, 2008	Jul 21, 2008	Approve	**Comments
OC...	B59999-02	1 5	5878 Student Assignments	Aug 01, 2008	Jul 21, 2008	Approve	**Comments
Por...	999-66	1 6	5908 Student Termination of Employment	Aug 03, 2008	Jul 21, 2008	Approve	**Comments
Rot...	99999-00	1 8	5887 Student Assignments	Aug 01, 2008	Jul 21, 2008	Approve	**Comments
Tar...	T,	1 8	5884 Student Adjustments	Aug 01, 2008	Jul 21, 2008	Approve	**Comments

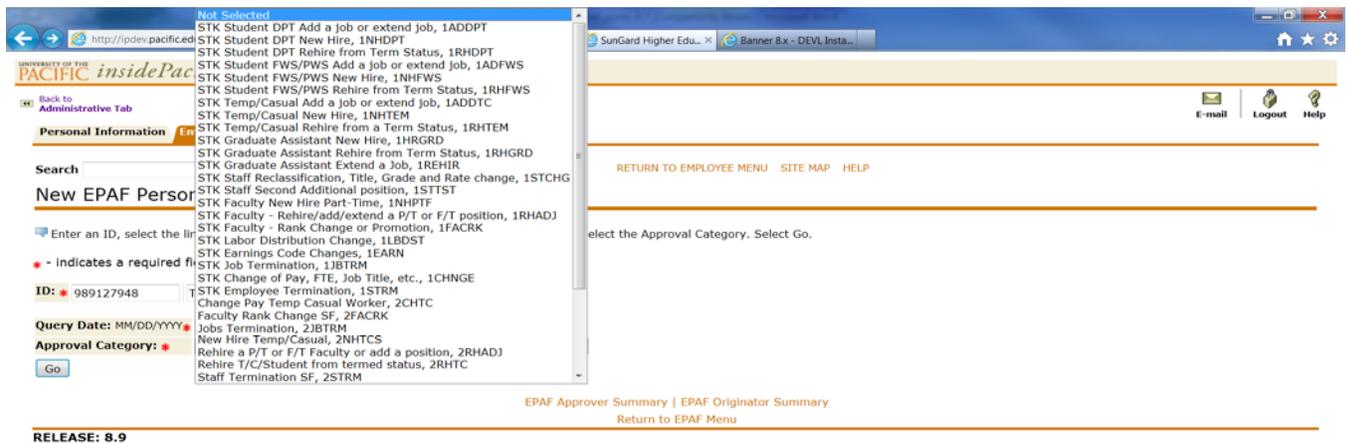
1 - 5 of 5

When an EPAF is **Successfully Applied to Banner Payroll**, the originator will receive a confirmation E-mail and the Approver will be able to view that it is complete.

If an EPAF is **Returned for Correction**, the originator will receive an alert e-mail. The originator must log into the **EPAF Originator Summary** to view, void, update, or re-submit the EPAF.

7 Approval Categories

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



Select the Approval Category from the drop-down menu with this consideration:

Select the category most appropriately fits the job change of EPAF that is being created.

For example, if the reason for the EPAF is to add a position for a student, select approval category STK Add a Job.

A) EPAF Payroll Options:

DPT Student – Student employees whose positions are charged 100% to the department index.

FWS Student – Student employees whose positions are charged 25% to department index and 75% to Federal Work-Study Grant.

PWS Student – Student employees whose positions are charged 25% to department and 75% to the University Grant.

T/C – Temp-Casual employees who are part-time and are not students of the University.

Graduate Assistants – Student employees who are awarded a stipend and units for their graduate work.

Staff – Semi-Monthly administrative (exempt or non-exempt)

employees.

Faculty – Full-time or Part-time Faculty. Also additional assignments for either of the FT or PT employees.

B) EPAF Approval Types:

Add a Job – Select this type of EPAF only if the employee is currently working on campus in another position or if you are extending their current position.

New Hire – Select this type of EPAF if you are hiring this employee for the first time on campus.

Rehire – Select this type of EPAF if you are rehiring this employee who has been terminated on Banner Payroll.

Labor Distribution – Select this type of EPAF if you are going to add an Activity Code to the employee's current position or are changing the labor distribution of the existing job.

Job Termination – Select this EPAF to terminate an employee's assignment.

Salary Change – Select this EPAF to change only the salary or hourly rate of an existing assignment.

Earn Code – Select this EPAF to change the Earnings Code on an existing employee's position.

8 Routing Queue

The Routing Queue determines the individuals who approve the EPAF.

- 10 – (HIRMGR) Hiring Manager
- 15 – (PI) Principle Investigator
- 20 – (DPTHEd) Department Head
- 30 – (BUDMGR) Budget Manager
- 35 – (GRANTS) Grants
- 40 – (VPDEAN) Vice President/Dean
- 45 – (GRADOF) Graduate Office
- 49 – (ACDANA) Academic Budget Analyst
- 50 – (ACDBUD) Academic Budget Office
- 51 – (ACDADM) Provost Admin
- 55 – (FINAID) Financial Aid
- 60 – (UNVBUD) University Budget Office
- 70 – (HRAPPR) Human Resources
- 80 – (PAYROL) Payroll
- 91 – (APPLY) HR Apply
- 99 – (SUPER) Super User

Each required Approval Level populates within the EPAF based upon the Approval Category. However the Originator must select the User Name for each level.

Important: In some cases the Originator may select himself as the Hiring Manager as well.

There are three possible **RequiredActions**:

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

Apply Only an individual at the payroll level can “apply” an EPAF. This is the action that occurs when an EPAF is converted into a jobs record in the payroll system. Always select the same individual who approves an EPAF at the *Payroll Level (90)* to *Apply (99)* the EPAF.

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

TIP: If someone would like to have viewing access to the EPAF, indicate their name as an FYI. Only registered EPAF users can receive an FYI of a

Approver does not perform the required action of “FYI.”

9 Comments

The Comment field allows the Originator to input any text to add information and clarification to the EPAF. This information should be included in the comment field, for example:

Stipend EPAF:

Specifically detail total payment amount, number of payments, individual payment amount, and payment start/end dates.

Faculty EPAFs:

Include course number and amount of units. For part time faculty, also include course dates.

Retro / Adjustment EPAFs:

Indicate reason for late EPAF. Specifically include what job change the EPAF initiates and the true effective date. Also indicate if back-pay is owed to employee.

Transfer:

For E-Class Transfers, enter the E-Class from which they are transferring, as well as their new E-Class.

10 Examples of EPAFs

To ensure that this employee is technically a New Hire, click on All Jobs. If no assignments are listed, then enter the position number suffix and then Select. If there are any assignments listed, then exit this EPAF and select another EPAF accordingly.

Important

Query Date on any EPAF: This date is the date the employee will begin their new or renewed position.

The Student/Temp-Casual/Graduate Assistant New Hire Form looks something like this example:

New hire or Rehire Student, GA or T/C Stockton

Item	Current Value	New Value
Employee Status: *(Not Enterable)		<input type="text" value="A"/> New Value fields must be entered
Employee Class Code: *(Not Enterable)		<input type="text" value="SS"/>
Home COAS: *(Not Enterable)		<input type="text" value="1"/>
Home Organization: *		<input type="text" value=""/>
Distribution COA: *(Not Enterable)		<input type="text" value="1"/>
Distribution Orgn: *		<input type="text" value=""/> If 99999 code entered, don't change
District Code: *		<input type="text" value="99, Stockton Student Employee"/>
Current Hire Date: MM/DD/YYYY*		<input type="text" value=""/>
Location Code: *		<input type="text" value="1, Stockton"/>
Campus Code: *		<input type="text" value="1, Stockton"/>
I9 Form Indicator:		<input type="text" value="Not Selected"/>
I9 Date: MM/DD/YYYY		<input type="text" value=""/> I9 date must be entered
I9 Expiration Date: MM/DD/YYYY		<input type="text" value=""/>
Job Begin Date: MM/DD/YYYY*		<input type="text" value=""/>
Jobs Effective Date: MM/DD/YYYY*		<input type="text" value=""/>
Contract Type: *		<input type="text" value="Not selected"/> New Hire positions are Primary
Personnel Date: MM/DD/YYYY*		<input type="text" value=""/>
Job Status: *(Not Enterable)		<input type="text" value="A"/>
Title: *		<input type="text" value=""/>
Employee Class Code: *		<input type="text" value=""/>
Job Change Reason: *		<input type="text" value="Not Selected"/>
Regular Rate: *		<input type="text" value=""/> List Hourly Rate
Assign Salary: *		<input type="text" value=""/> List Hourly Rate
Hours per Pay: *(Not Enterable)		<input type="text" value="1.0"/>

Step: *(Not Enterable)

FTE: * FTE is "1"

Factor: *(Not Enterable)

Pays: *(Not Enterable) * Hrly rate x Factor = Annual Salary

Annual Salary: *

Supervisor ID: * WTE Supervisor ID

Supervisor Position: * WTE Supervisor position #

Supervisor Suffix: *(Not Enterable)

Contract Begin Date: MM/DD/YYYY*

Contract End Date: MM/DD/YYYY*

New

Effective Date: MM/DD/YYYY

Labor Distribution will populate below

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
<input type="text" value="1"/>	<input type="text" value="ACHM"/>	<input type="text" value="110001"/>	<input type="text" value="10111"/>	<input type="text" value="6052"/>	<input type="text" value="101030"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="100.00"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total:										100.0	
l:										0	



NBAJOBS Termination: Fill in Values to term position

Item	Current Value	New Value
Job End Date: MM/DD/YYYY		<input type="text"/>
Jobs Effective Date: MM/DD/YYYY*		<input type="text"/>
Personnel Date: MM/DD/YYYY*		<input type="text"/>
Job Status: *(Not Enterable)		<input type="text" value="T"/>
Job Change Reason: *(Not Enterable)		<input type="text" value="JOBEN"/>

EPAFs for Faculty and Staff Assignments

The Faculty and Staff Assignments forms are used to create new or extend assignments for current Faculty and Staff employees.

Important

Query Date on any EPAF: This date is the date the employee will begin their new or renewed position.

The Faculty/Staff Assignment Form looks something like this example:

Secondary Job: Staff or Faculty

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		<input type="text"/> Enter Date when first hired
Jobs Effective Date: MM/DD/YYYY*		<input type="text"/> Enter Date of new assignment
Personnel Date: MM/DD/YYYY*		<input type="text"/> Enter Date of first work day
Job Status: *(Not Enterable)		<input type="text" value="A"/>
Title: *		<input type="text"/>

Job Change Reason: *	Not Selected
Step: *(Not Enterable)	0
Regular Rate: *	<input type="text"/> Hrly rate or Salary Rate
Assign Salary: *	<input type="text"/> Hrly rate or Salary Rate
Hours per Pay: *	<input type="text"/>
Factor: *	<input type="text"/>
Pays: *	<input type="text"/>
Annual Salary: *	<input type="text"/> *
Contract Type: *	Not selected Usually Secondary

Non-Exempt Staff are paid Hourly

Exempt Staff are paid on Voucher

Faculty are paid either per pay period or on Voucher

*Either can be paid for a number of pay periods equal to the Annual Salary

NBAJOBS Termination: Fill in Values to term position

Item	Current Value	New Value
Job End Date: MM/DD/YYYY		<input type="text"/>
Jobs Effective Date: MM/DD/YYYY*		<input type="text"/>
Personnel Date: MM/DD/YYYY*		<input type="text"/>
Job Status: *(Not Enterable)		T
Job Change Reason: *(Not Enterable)		JOBEN

11 Setting Up a Default Routing Queue

A Default Routing Queue allows the user to customize the routing queue for every Approval Category, or type of EPAF, that he or she creates. Follow these steps to customize and save Default Routing Queues:

1. Under Employee Tab in Inside Pacific, select EPAF Menu

2. Select **EPAF Originator Summary**
3. Select **Default Approval Queue**
4. Select the specific Approval Category from drop-down list
5. Fill in the open data fields, using the magnifying glass search function, for each required approval level

12 Job Change Reasons

Although you may see a long list of Job Change Reasons, here are a few most frequently used Banner Names:

ADJOB	Additional Job on Campus
AMI	Annual Merit Increase
AWARD	One-Time Award
BACKG	No Background Check
CPTRN	Campus Transfer
DEVLE	Faculty Development Leave
DPFWS	Change from FWS position to DPT position
DPTRN	Department Transfer
ECLS	Change of E-Class
ECSAL	E-Class/Salary Change
EQADJ	Equity Adjustment
ERNCD	Change of Earn Code
FACPR	Faculty Promotion to Tenure Track
FAREH	Faculty Rehire
FTPT	Full-time to Part-time
FWSDP	Change from DPT position to FWS position
FRTCH	Index Change on Grant
GRTEN	End of Grant Funding
GTREW	Grant Renewed
HONOR	Honorarium
HOSAL	Housing Allowance
INCPO	Incorrect Position
INTER	Interim Position
JOBEN	Job Ends
LBDST	Labor Distribution Change
LEAVE	On Leave

MERIT	Merit Increase
NEWH	New Hire Employee
NOI9	I-9 Information Incomplete
ONEPY	One-Time Pay
POSRE	Position Renewed
PRCLS	Promotion/Reclassification
PROMO	Promotion
PTFT	Part-time to Full-time
REHIR	Staff Re-Hire
RESGN	Employee Resigned
SALCH	Salary Change
SALCO	Salary Correction
SS	Summer Session
STUHR	Student New Hire
STURH	Student Rehire
TERM	Employee Terminated
TRANS	Transfer
WSOVR	FWS Overage

13 Errors Messages

Once you submit the EPAF, if there are any issues within the EPAF, the screen will show one of two message types:

Warning – Warnings simple deliver information to the user, but will still allow the EPAF to process successfully.

Error – Error messages will not allow the EPAF to progress to the approval levels. Errors must be corrected.

These errors indicate the following:

ERROR ID is not defined as an employee – Establish Employee Record
Employee must first be entered in Banner by HR

ERROR Job Begin Date cannot be after Employee's Termination Date
Employee must first be activated in Banner with correct EPAF

- *ERROR* New Effective Date cannot be after Employee's Terminate Date
Employee is terminated on Banner Payroll and must first be activated in Banner with correct EPAF
- *ERROR* Begin Date must equal the first Jobs Detail Effective Date
Employee has worked in this position before and the very first date must be entered in the Job Begin Date
- *ERROR* Date cannot be prior to the Base Job Begin Date
- *ERROR* Effective Date must be greater than Last Paid Date
These errors mean that the action being initiated has an effective date prior to the last paid date on this job record. Review and Correct
- *ERROR* Rate times factor times pays does not equal Annual Salary
This error means that the Annual Salary divided by the number of pays does not equal the Assigned Salary. Try using four numbers past the decimal on the Assigned Salary and check the number of pays
- *ERROR* Employee already has a Primary Job
Change the Contract Type from Primary to Secondary Job in the body of the epaf
- *ERROR* The future dated Job record must be deleted before ending Job
Remove future date in EPAF – Job Term 1JBTRM by putting a dash (-) in the Job End Date
- *ERROR* Date cannot be after the Base Job End Date of _____
Pay correction could not take place because the job was ended. Please use new EPAF to rehire employee to make the pay change

14 Employee E-Classes (E-Class)

Please refer to the E-Classes below for your employee(s)

<u>E-Class</u>	<u>Description</u>
AA	Administrator FT Exempt
BB	Administrator PT Exempt
CC	Faculty FT Exempt 9-10 Months
DD	Faculty FT Exempt 11-12 Months
EE	Faculty PT Exempt Less than 50% FTE
FF	Faculty PT Exempt Less than 100% but at least 50% FTE/9 months
JJ	Staff FT Exempt
KK	Staff PT Exempt
NN	Staff FT Non-Exempt
OO	Staff FT Non-Exempt
PP	Staff PT Non-Exempt
SN	Student Non-Resident
SS	Student
UU	Union FT Non-Exempt
VV	Union PT Non-Exempt
WW	Staff TC Non-Exempt
XN	Grad Assist – Non-Resident
XR	Grad Student – Resident (SF)
XX	GA Non-Exempt
YY	Stipend Pay Only

15 Proxies

1. Go to **Electronic Personnel Action Form** under the **Employee** Tab.
2. Select **EPAF Proxy Records**.

Electronic Personnel Action Form

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

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

EPAF Proxy Records

Approval Level: Human Resources, HRAPPR

Name	Remove	Add
Not Selected	<input type="checkbox"/>	<input type="checkbox"/>

4. From the **Name** drop down menu, select the individual to designate as the Proxy Approver.
5. Check "Add" next to the individual's name, then click **Save**.

Important:

When designating a Proxy Approver, be advised that the proxy must have security access at the designated approval level. He or she must have completed the Confidentiality Agreement and FERPA Certificate.

Act as a Proxy Approver

1. Go to **Electronic Personnel Action Form** under the **Employee** tab.
2. Select **Act as a Proxy**.

Electronic Personnel Action Form

-  [EPAF Approver Summary](#)
-  [EPAF Originator Summary](#)
-  [New EPAF](#)
-  [EPAF Proxy Records](#)
-  [Act as a Proxy](#)

3. Select the individual you wish to **Proxy For** with the with the drop down menu.
4. **Submitted From Date** and **Submitted To Date:** Leave blank if you want to see all EPAFs that require this individual's approval. Or input submission date parameters.
5. Click **Go**.

Proxy or Superuser or Filter Transactions

 Act as a proxy or a superuser and enter the following criteria to filter transactions.

Proxy For:	Self 
Act as a Superuser:	<input type="checkbox"/>
Submitted From Date: MM/DD/YYYY	<input type="text"/>
Submitted To Date: MM/DD/YYYY	<input type="text"/>
Transactions Per Page:	25 
<input type="button" value="Go"/>	

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

Important:

1. You must have security access at the levels for which you will approve and you must be a designated proxy by the original approver in order to see their EPAFs.

Emails:

When does the system send e-mails regarding EPAF statuses?

The originator of the EPAF will receive an automatically generated email when the EPAF has been **applied** or **returned for correction**.

How do I know if my EPAF has been returned for correction?

You should receive an email notification should your EPAF be returned. You can check your Originator Summary and view its **Current** tab to see any EPAFs that may have been returned to you for correction. The Approver who sent it back to you should always comment on the correction needed.

How do I know if my EPAF has been applied?

A status of "Completed" indicates that all approvals have been obtained and that HR has applied the EPAF.