

2013

# EPAF User Guide




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The Evergreen State College

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## Access and Security

Access to EPAFs in Banner Self Service will be granted to individuals after completion of EPAF training. Before requesting training, please check your access to [my.evergreen.edu](https://my.evergreen.edu) and the Adminweb reports - [EPAF Work Areas](#) and [EPAF Hourly and Student Positions](#). Report any additional needs at the time that you request your EPAF training.

## Getting to the EPAF page in Banner Self Service

- Navigate to <https://my.evergreen.edu> from your web browser (internet explorer, Firefox, etc).
- Choose Budgets and Finance link from the Employees section.
- Choose Electronic Personnel Action Forms

**Employees**

- [Budgets and Finance](#) view budget information
- [Employee Account Summary](#) Your Evergreen account charges and payments
- [Employee Services](#) Deductions, tax records, pay information, general employee services
- [Leave Approvals](#)
- [Leave Requests](#) Manage your leave requests
- [My Files](#) access your personal network files
- [Pay History](#) View pay history, manage W4 and W2 tax info
- [Supervisor Certification](#)
- [Time Sheet - Student and Temporary](#) Student and hourly employees manage time reporting
- [Work Certification - Permanent Employees](#) Permanent employees manage work certification

## Setting up your Default Routing Queue – for Originators

- Go to the Electronic Personnel Action Form page
- Choose EPAF Originator Summary
- Choose Default Routing Queue
- Select the Approval Category from the drop down list <sup>1</sup>
- Click **Go** <sup>2</sup> > Required Approval Levels populate <sup>3</sup>
- Select the appropriate approvers for your department (use the  <sup>4</sup> to see the list of approvers <sup>5</sup> for that level)
- Repeat set up process for each Approval Category.

**Electronic Personnel Action Form**

[EPAF Originator Summary](#)  
[New EPAF](#)  
 Act as a Proxy  
 RELEASE: 8.5

[New EPAF](#) | [Default Routing Queue](#) | Search | Superuser or Filter Transactions

[Return to EPAF Menu](#)

**Approval Category:** Student Action Form, STU-AF 1  2

**Approval Queue**

Approval Level <span style="float: right;">3</span>	User Name
10 - (10STU) Student Employment Data Review <span style="float: right;">4</span>	<input type="text"/>
30 - (30STU) Student Only Appointing Author	<input type="text"/>
99 - (99) Database Applier	<input type="text"/>
Not Selected	<input type="text"/>
Not Selected	<input type="text"/>
Not Selected	<input type="text"/>
Not Selected	<input type="text"/>

Mandatory Levels defaulted from Electronic Approval Category

Valid Values - Mozilla Firefox

https://bannerwebtest.evergreen.edu

### Valid Values

Search:

**User Names,**  
**10 - Student Employment Data Review**

5 Elliott, Scott L. (ELLIOTTS) ▲

Appointing Authorities (30) are assigned by the Board of Governors and the list is maintained by HR. Appointing Authorities can assign Student Only Appointing Authorities (30STU) by contacting HR.

## Setting up your Proxy – for Approvers

- Go to the Electronic Personnel Action Form page
- Choose EPAF Approver Summary
- Choose Update Proxies
- Select the Approval Category from the drop down list<sup>1</sup> Click **Go**<sup>2</sup>
- Select Proxy's name from drop down list<sup>3</sup>
- Click **Add** box<sup>4</sup>
- Click **Save**<sup>5</sup>
- Be sure name shows on list<sup>6</sup>
- To remove a proxy click **Remove** box<sup>7</sup>
- Repeat set up process for each Approval Level.

**Electronic Personnel Action Form**

[EPAF Approver Summary](#)  
[EPAF Originator Summary](#)  
 New EPAF

[New EPAF](#) | [Update Proxies](#) | Search | Proxy or S

### EPAF Proxy Records

**Approval Level:** Student Only Appointing Author, 30STU 1  2

Name	Remove	Add
Alle AD) <span style="float: right;">6</span>	<input type="checkbox"/>	<input type="checkbox"/>
He (STL) <span style="float: right;">3</span>	<input type="checkbox"/>	<input type="checkbox"/>

5

## New EPAF - Creating an Electronic Personnel Action Form

- Go to the Electronic Personnel Action Form page
- Choose New EPAF


### New EPAF Person Selection

- Enter Employee's ID (A#)<sup>1</sup> and Tab> the name will populate
- Double check the name<sup>2</sup>
- Enter first day of work for this job action into the Query Date field<sup>3</sup>  
(format must be MM/DD/YYYY)
- Choose Approval Category<sup>4</sup>
- Click **GO**<sup>5</sup>

### New EPAF Person Selection

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date

\* - indicates a required field.


ID: \* A01234567 **1** Pretend Employee **2** 

Query Date: MM/DD/YYYY\* 05/01/2013 **3**

Approval Category: \* Student Action Form, STU-AF **4** ▼

Go **5**

Do not use Generate ID


Be very cautious if you use the Search icon 

You must verify the middle name and birth date - many duplicate names exist in Banner and you are creating a hiring document for the person you choose

### Job Selection Screen

- Click **All Jobs**<sup>1</sup> > this will show you all jobs the employee has had in Banner. (Note: clicking Active Jobs will return results as of the Query Date that you entered on the prior screen...you should have entered the start date of this job action.)
- If the position that you are hiring into is listed, you may select it by checking the **Select** button<sup>2</sup> on the far right.

(Remember: the position must have the correct **Work Area Code, Org, and Employee Class**. If the employee previously held this position, you will see the title that was assigned to the position instead of the work area - org - eclass.)

➤ If there are no jobs listed, or if you are unsure of which position to use, you should use the Search  feature<sup>4</sup> or the EPAF Work Areas report. However, before continuing with your EPAF you will need to understand how to [Choose the Correct Position](#).


- If your position is not listed, but you know the position number, enter it and tab to the suffix field
- Enter the suffix 00. Tab. Check that the suffix was accepted as 00.
- Click **Go**<sup>3</sup> (do not click Next Approval Type)
  - If you don't need to search for a position number you can skip to [Completing the EPAF](#).

## New EPAF Job Selection

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

ID: Pretend Employee, A01234567  
 Query Date: May 01, 2013  
 Approval Category: Student Action Form, STU-AF

### Create/ Update Job Record, JR

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
 <b>4</b>	New Job									<input type="radio"/>
	Primary	9890S1	00	Assistant	3226, Mail Services	Jan 01, 2013	Jun 15, 2013		Active	<input checked="" type="radio"/> <b>2</b>

The suffix must be 00. Tab after entering and double check suffix.

All Jobs **1**

Next Approval Type Go **3**

## Choosing the Correct Position

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### About Pooled Positions for Hourly and Student Employees

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For budgeting purposes, **pooled positions** mean a group of employees with jobs in the same work area, org, and employee class **will share a common position number**.

### Finding Position Numbers for Hiring

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The three things you must know to select the right position number for an hourly or student employee are:

**the work area code, the org, and the employee class.**

Each position is set up in Banner based on these three elements, so choosing the correct position is crucial.

### Work Areas and Work Area Codes (formerly called Approver Codes)

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A **work area** is a group that **shares a common timesheet approver**. This person is often called a work area lead, and they may or may not be a supervisor. Each work area has a code that stays with the work area even if the approver changes. Work areas are maintained by Human Resources.

### Choosing the Correct Employee Class

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The **employee classes** are:

S1- Student – Institutional

S2- Student - State Work Study

S5- Student - Federal Work Study

S6- Student - Evergreen Work Study

T1- Temporary - Classified

T2- Temporary – Admin OT Eligible

T3- Temporary – Admin OT Exempt

T4- Temporary – Hourly OT Eligible

T5- Temporary – Hourly OT Exempt

### Employee Class for a Student position

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Does the student have a work study award that will be used for this position?

- No – The employee class will be S1- Student – Institutional
- Yes – The student's work study award letter will show what type of work study they have. Have them show it to you, or contact Student Employment to verify the work study type.

### Employee Class for a Temporary/Hourly position

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Human Resources can help you choose from the following Temporary/Hourly Employee Classes.

- **T1 - Temporary – Classified:** A funded, classified position in which the incumbent is performing the full scope of the job duties on a temporary basis. May or may not be exempt from FLSA.
- **T2 - Temporary - Admin OT Eligible:** A funded, exempt from civil service position in which the incumbent is not performing the full scope of the regular exempt position. Not exempt from FLSA.
- **T3 - Temporary - Admin OT Exempt:** A funded, exempt from civil service position in which the incumbent is not performing the full scope of the regular exempt position. Exempt from FLSA.
- **T4 - Temporary - Hourly OT Eligible:** A funded, classified position being filled on a temporary basis in which the incumbent is not performing the full scope of the job duties. Not exempt from FLSA.
- **T5 - Temporary - Hourly OT Exempt:** A funded, classified position being filled on a temporary basis in which the incumbent is not performing the full scope of the job duties. Exempt from FLSA.

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**Positions are pooled so it's ok for more than one person to have the same position number.**

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## Choosing the Correct Position Number

### New Position Selection – Using the Search Feature

- Choose the Employee Class
- Choose “E” for the COA
- Choose the Budget Org that the wages will be charged to
- Click **Go** > search results will appear
- Click on the position you need
- Enter suffix 00 - Tab and double check that suffix says 00
- Click **Go**

**Search Criteria**

Position Number:

Employee Class: MS, Volunteers - Unpaid  
P1, One Time Pay  
S1, Student - Institutional

COA: All  
E, The Evergreen State College

Budget Organization: 22302, Galleries  
22401, Seawulff  
22402, Science Operations

Position	Title	Employee Class	COA	E
8103S1	2C2110 - 022402 - INST	S1, Student - Institutional	E	224
8140S1	2B2200 - 022402 - INST	S1, Student - Institutional	E	224
9952S1				
9954S1				
9966S1				
9968S1				
9988S1				
9992S1	2B2100 - 022402 - INST	S1, Student - Institutional	E	224

- The search results will show all positions with the employee class and org that you searched for.
- The titles are comprised of work area code<sup>1</sup> – budget org<sup>2</sup> – employee class<sup>3</sup>
- You will need to select a position in the correct work area<sup>1</sup>.

If you are unsure of the work area, you should use the [EPAF Work Areas report](#).

### New Position Selection – Using the EPAF Work Areas Report

- Navigate to [Adminweb](#) / My Reports / Finance/ EPAF Work Areas > a report will open showing all work areas

#### Finance

- [EPAF Hourly and Student Positions](#)
- [EPAF Work Areas](#)

- Click on the approver's name >

2C2110	----- Acad Science Operations	Robinson,	<input type="text"/>
2C2111	----- Acad Sci Ops Hourly 1 Lab Support	Robinson,	<input type="text"/>

Find: robin        Match case

(Hint: On the EPAF Work Areas report you can use CTRL F to bring up a search box and search by name.)

A report will open in a second window showing **all work areas and positions** that are led by, or whose timesheets are approved by the person you selected

- Find a position number with the correct **work area – org – employee class**  
Positions are pooled so it's ok for more than one person to have the same position number

WA Code	Work Area	Lead	Posn	Job Title	Employee	Job Assigned
2C2110	Acad Science Operations	Robinson,	8103S1	2C2110 - 022402 - INST		
2C2110	Acad Science Operations	Robinson,	8103S5	2C2110 - 022402 - FWS		
2C2110	Acad Science Operations	Robinson,	8145S1	2C2110 - 221216 - INST	Bl y	09/17/12 to 06/15/13
2C2130	Acad Organic Farm Operation	Robinson,	8252T4	2C2130 - 022402 - T OT		
2C2130	Acad Organic Farm Operation	Robinson,	8260T4	2C2130 - 022404 - T OT		

(Hint: You can also use the EPAF Work Areas report to see the job dates for current employees – see Job Assigned column.)

In the example above, if you are hiring someone who's timesheet approver is Robinson, you will need to know if they are working in Science Operations (work area 2C2110), or the Organic Farm Operations (work area 2C2130). If they are working for Science Operations, you will look for positions in work area 2C2110

- Remember, the titles are comprised of: **work area code – org – employee class**
- Position **8103S1** is in work area **2C2110** - on org **22402** - and employee class **S1 (student – institutional)**

## Request a New Position

- If your search has not returned the desired org or employee class, reselect from the drop down lists and click Go.
- If you have the correct org and employee class, but do not see a position with the correct Work Area, then you may need to request a new position. Please contact Student Employment for student jobs, and Human Resources for temporary/hourly jobs.

## When Multiple Position Numbers Match Your Criteria

In some cases you may find two position numbers with the same work area code, same org, and same employee class. **Either position can be used - (they are set up the same way in Banner).**

### Search Results

▲ Position ▼	▲ Title ▼	▲ Empl ▼
8103S1	2C2110 - 022402 - INST	S1, Stu
8140S1	2B2200 - 022402 - INST	S1, Stu
9952S1	2C2131 - 022402 - INST	S1, Stu
9954S1	2C2124 - 022402 - INST	S1, Stu
9966S1	2C2113 - 022402 - INST	S1, Stu
9968S1	2C2112 - 022402 - INST	S1, Stu
9988S1	2B2200 - 022402 - INST	S1, Stu
9992S1	2B2100 - 022402 - INST	S1, Stu

The reason for multiple position numbers per org and approver:

- Sometimes an employee has **two simultaneous jobs** that have the same work area code, same org, and same employee class, but they have different titles or pay.
- When this happens the employee needs to have **two different position numbers**.
- Having two position numbers is what enables them to have **two different timesheets**...one for each job.
- You do not need to select a new position to make job changes unless the position has **a change** in work area, org, or employee class.

## Completing the EPAF

Before you begin to complete the EPAF, review the information that has populated at the top.

- Verify that the Name and ID are correct<sup>1</sup>.
- Verify that the **Query Date<sup>2</sup>** is the date of the job action you are submitting (ex. the date of the hire or the extension date).
- Verify that you have selected the correct Approval Category<sup>3</sup> (ex. Student Action Form, or Temporary/Hourly Action Form).

### Electronic Personnel Action Form

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

**Name and ID:** 1 Pretend Employee, A01234567

**Transaction:** 2 **Query Date:** May 01, 2013

**Transaction Status:**

**Approval Category:** Student Action Form, STU-AF 3

Save

If any of these items are incorrect select Return to EPAF menu from the bottom of the page and begin again. If everything is correct you may continue by filling out the fields in each section.

## General Information About EPAF Fields

**\* -** indicates a field that you are required fill in  
**(Not Enterable)** - indicates that you cannot fill in this field, you can just look

**\*(Not Enterable)** - if it's required and not enterable, then it's already filled in for you

**Current Value column** - will be filled in if there are already records for that section (ex. there is already an employee record for *this employee*, or there is already a job record for *this person on this position number*)

**Current Value column** - will be blank if there are not already values in Banner for this employee or position.

**New Value column** - where you will fill in all required fields.

\* - indicates a required field.

Create/ Update Employee Record,

Item	Current Value	New Value
Home COAS: *(Not Enterable)	E	E
Check Distribution: *(Not Enterable)	32, Director of Business Services	32
Employee Status: *(Not Enterable)	Active	A
I9 Form Indicator: (Not Enterable)	Not Received	
I9 Date: MM/DD/YYYY(Not Enterable)		
Home Organization:	3226, Mail Services	Q
Employee Class Code:	S1, Student - Institutional	Q
Current Hire Date: MM/DD/YYYY	01/01/2013	

(Hint: Required fields vary by epaf type. If the current value is correct and the field is not required, then you should leave it blank.)

Approval Categories: **Student Action Form (STU-AF) & Temp/Hourly Action Form (TMP-AF)**

**Create/ Update Employee Record**

Item	Current Value	New Value
Home COAS: (Not Enterable)	E	E
Check Distribution: (Not Enterable)	32, Director of Business Services	32
Employee Status: *(Not Enterable)	Active	A
I9 Form Indicator: (Not Enterable)	Not Received	(Not Enterable) Use indicator to see I-9 status
I9 Date: MM/DD/YYYY(Not Enterable)		Submit I-9 to HR/SEO if status is Not Received
Home Organization: *	3226, Mail Services	Fill in the Org number for this job
Employee Class Code: *	SI, Student - Institutional	For Students: Fill in Employee Class of this job For Others: Employee's Primary EClass (confirm w/ HR)
Current Hire Date: MM/DD/YYYY *	? 01/01/2013	Date of hire into current position




**Create/ Update Job Record**


Item	Current Value	New Value
Base Job Begin Date: MM/DD/YYYY	? 01/01/2013	<ul style="list-style-type: none"> <li>Leave blank if Current Value is filled</li> <li>Use job begin date if Current Value is blank</li> </ul>
Jobs Effective Date: MM/DD/YYYY *	? 01/01/2013	Fill in the start date of this job or this extension
Personnel Date: MM/DD/YYYY *	? 01/01/2013	Fill in the start date of this job or this extension
Contract Type: *	? Primary	Use Primary. If you get the message "employee has primary job" then switch to Secondary
Timesheet Orgn: *	3226	Fill in the Org number for this job
Job Status: *(Not Enterable)	? Active	A
Title: *	Assistant	Fill in Title <b>Hint: you can copy/paste from the Current Value</b>
Job Change Reason: *(Not Enterable)		SJOB
Step: *(Not Enterable)	0	0
Hourly Rate: *	9.19	Fill in the hourly rate of pay for this job
Hours per Pay Period: *	? 17	Fill in the average expected hours per 1/2 month

**Job Status Change Record**

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY *	? 01/01/2013	Fill in the end date of this job or this extension
Personnel Date: MM/DD/YYYY *	? 01/01/2013	Fill in the end date of this job or this extension
Job Status: *(Not Enterable)	? Active	T
Job Change Reason: (Not Enterable)		ENDJ

**Routing Queue - required approval levels differ according to EPAF type. This is an example of STU-AF queue.**

Approval Level (cannot change these)	User Name	Required Action
10 - (10STU) Student Employment Data Review	 <input type="text"/>	Approve
30 - (30STU) Student Only Appointing Author	 <input type="text"/>	Approve
99 - (99) Database Applier	 <input type="text"/>	Apply

~Your Routing/Approval Queue will be filled in if you have set up your defaults.  
~You can make changes to the names if they are appropriate.  
~Use the  to search for names.



## Definitions

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**Query Date:** Banner searches will return the records active as of the Query Date. When you begin a new EPAF you should query on the date of the job action (hire, extension, rate of pay change, etc.) This date will default into various fields so please be cautious with your entry. Once the EPAF is initiated you will be able to select all jobs to see an employee's position history.

**Employee Class Code:** An alpha numeric code to distinguish the type of employee. *For students you will enter the employee class that matches the position you are hiring, extending, etc. For temporary hourly employees you should confirm the employee class with HR.* Classified, exempt, and faculty employees will have an employee class that matches their primary position. An employee may have a secondary position that is out of their employee class (ex. A classified employee may have a temporary hourly position for a few hours each week in addition to their classified position. Their employee class should not be changed because their primary employee class is still classified.)

**Current Hire Date:** Employee's initial date of hire in their current position. If an employee changes positions there will be a new Current Hire Date. *For students you may use the Jobs Effective Date. For others if you are unsure of the employee's position history you should confirm the current hire date with HR.*

**Base Job Begin Date:** The date that the employee was first assigned this position number. If there is a current value for the position you are hiring into, you will need to copy it, or leave this field blank if it is not required on your EPAF. If this is the first time the employee has held this position number you will fill in the date that the employee begins this position.

**Job Effective Date:** The date that the employee begins working, or the first date of this extension or job action. The effective date should be within the current or future pay period. This is the effective date of this job action (hire, title change, extension, etc.) for payroll and benefit purposes. New records entered to NBAJOBS cannot be made with an effective date prior to the 'Last Paid Date' on the NBAJOBS record.

**Personnel Date:** This field is available to note the actual date that a job action should have occurred. Entering a prior or retroactive Personnel Date will not cause the action to take effect in the past. (You must contact HR/SEO for all retroactive changes)

**Contract Type:** This indicates the type of job - P Primary, S Secondary. *For students this is non-essential and many students have multiple jobs, none of which are more primary by definition. You should choose primary first, then switch to secondary if you receive an error. For temporary hourly employees you should do the same and contact HR if you have questions.* Classified, exempt, and faculty employees will always have a primary position. An employee may have a secondary position that is out of their employee class (ex. A classified employee may have a temporary hourly position for a few hours each week in addition to their classified position. This would be a secondary position.) Do not use O Overload.

**Job Status:** This indicates the status of the job for each record in the EPAF - A Active, T Terminated  
– The first job record in an EPAF is generally A Active status and indicates the start date of the job, raise, extension, etc.  
– The second job record in an EPAF is generally T Terminated and indicates the end date of the job, extension, etc.  
**Do not use** L Leave without pay or benefits, B Leave without pay and with benefits, F Leave with full pay and benefits, or P Leave with partial pay and benefits without consulting with HR.

**Hours Per Pay Period:** Average hours (not max hours) that employee is expected to work per half month pay period. *For students this should not exceed 34 on all jobs combined. For temporary hourly employees, if the hours per pay is expected to be 40 or greater, you should contact the benefits office for a benefits eligibility determination before offering the position.*

## After Completing the EPAF – for Originators

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### **EPAF Buttons:**

**Save** – will save the work you have done.

**Submit** – when you have completed an EPAF you can submit it for approval.

**Delete** – will completely remove an EPAF that has not been submitted. It will be removed from the history.

**Void** – will remove the EPAF from the queue, but the voided EPAF will still be visible in the history.

**Return for Correction** – will allow an originator to remove the EPAF from the approval queue and make corrections.

After corrections it will need to be saved and submitted a second time.

**Cancel – does not cancel a job action or end a job.** The cancel button is available after an EPAF has been applied.

The job action is already in Banner and the cancel button will have no effect on the job record. It is only intended to be an informational marker to show that an EPAF was incorrect and the job action was reversed by HR or SEO.

### **EPAF Originator Summary**

To see your EPAFs select the EPAF Originator Summary link from the Electronic Personnel Action Form page.

### **Tabs:**

**Current** – this tab will hold your saved, but not submitted EPAFs

**History** – this tab will hold your submitted EPAFs and any EPAFs that have been returned to you for correction.

You should monitor the transaction status of your EPAFs until they reach completed status. You can click on the employee name to open the EPAF and review the approval queue status, and view comments that have been added during the approval process.

## Approving the EPAF – for Approvers

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### **EPAF Approver Summary**

To see your EPAFs select the EPAF Approver Summary link from the Electronic Personnel Action Form page. EPAFs that are ready for your approval will be listed in the Current tab. Click on the name to see the details of the EPAF. After you have reviewed the EPAF for accuracy and approved it, the EPAF will move to your History tab.

### **Tabs:**

**Current** – this tab will hold the EPAFs that are ready for your action.

**In My Queue** – this tab will hold EPAFs that are in your queue, but still need lower level approvals before you can take action on them.

**History** – this tab will hold EPAFs that you have already acted on.

### **EPAF Buttons:**

**Approve** – will add your approval and move the EPAF to the next person in the queue.

**Disapprove** – will remove an EPAF from the queue. The originator can go to their history tab to open the EPAF and can either void the EPAF or make corrections and resubmit.

**Acknowledge** – you can acknowledge an EPAF if you are listed as an FYI in the approval queue.

**Return for Correction** – will allow an originator to remove the EPAF from the approval queue and make corrections. After corrections it will need to be saved and submitted a second time.

**More Info** – you may use this status to indicate to others in the queue that you are gathering information needed before taking action on the EPAF. The originator will not automatically see this marker, but will have to open the pending EPAF in their history tab to see this status.

## Error and Warning Messages

Errors and Warning Messages			
	Type (indicates which section of the EPAF has an error)	Message Type	Description
<b>Recommended Action to Resolve Error</b>			
<b>1</b>	Create/ Update Job Record	ERROR	*ERROR* This employee already has a primary job. Switch Contract Type to Secondary. Save. Submit.
<b>2</b>	Create/ Update Job Record	WARNING	*WARNING* Future changes exist - starting on DD-MMM-YYYY. The EPAF cannot be applied. Review your entries for correct dates, then contact HR or SEO about the future dated record.
<b>3</b>	Job Change Reason and Date	WARNING	*WARNING* Future changes exist - starting on DD-MMM-YYYY. It is ok to have this warning on a Job Change Reason and Date Record. The future term date will be removed when the Early Termination EPAF is processed.