

Table of Contents

EPAFs – General	3
What is an “EPAF”?	3
Where can I find EPAFs?	3
Who would need to use an EPAF?	3
Why did EPAFs replace FormBlaster?	3
What happened to the old employee position numbers?.....	3
Does EPAF replace BSU@Work?.....	3
Creating EPAFs	4
How do I log in to EPAFs? What if my login fails?.....	4
UHRS just gave me an ID # for my new employee. Can I give it to my new employee so she/he can go to Bracken Library to obtain a BSU ID?	4
A faculty/professional employee is resigning or retiring. Do I use an EPAF for this?.....	4
What is the “Approval Category” in EPAF?.....	4
Will my approvers automatically appear in the EPAF?.....	4
What is the difference between “Approve”, “FYI”, and “Apply” in the Routing Queue section under “Required Action”?	4
What is an Applier?	5
How do I know who to select as an Approver?	5
How will my approver know there is an EPAF awaiting his/her approval/acknowledgement?.....	6
Can an approver make changes to an EPAF?.....	6
If my approver wants to set me up as a Proxy - how do I do this?.....	6
What’s an “E-Class”?	7
How are position numbers assigned to new positions?	8
I understand that position numbers have been created for my area and I can search for those under a specific Employee Class in my area. How do I do that?	8
What is a “Query Date”?.....	8
There are three date fields in the NBAJOBS section of the EPAF (Job Begin Date, PAF Effective Date, and Personnel Date). What is the difference?.....	8
What does “Current Value” mean in an EPAF?	9
What does “COA” mean?.....	9
What is the “Step” field?.....	9
Why would I need to complete the “Comments” section in an EPAF?	10
In the “End a Job Assignment” section on an EPAF, does Job Status “Terminated” mean I’m terminating the employee?	10
How do I pay someone from a grant?	10
If you are hiring a former graduate student as a contract faculty, will he/she keep his/her current BSU ID#?.....	10

How do I see my history of EPAF transactions? 10
I know I've made mistakes, and I want to start over on my EPAF. Can I do that? 11
EPAF Tips and Tricks..... 11
EPAF Types 13

EPAF Frequently Asked Questions

For help with choosing the correct EPAF, please refer to the table included at the end of this document titled “EPAF Types”.

EPAFs – General

What is an “EPAF”?

“EPAF” stands for “Electronic Personnel Action Form.” EPAFs are electronic forms in Banner used to create or update employee records. EPAFs replace the following forms:

- Notice of Appointment (NOA) formerly found on FormBlaster (NOA)
- Student Employment Authorization (SEA)

Where can I find EPAFs?

EPAFs are located in Self Service Banner (SSB) under the “Employee” section.

Go to: <https://my.bsu.edu>

Who would need to use an EPAF?

- An Originator in a school, department, or office
- An Approver – a supervisor/manager
- An Applier – in UHRS or Payroll

Why did EPAFs replace FormBlaster?

Since FormBlaster was locally developed and customized, it was not compatible with Banner. Think of EPAFs as a shortcut to creating or updating information in Banner.

What happened to the old employee position numbers?

A new Banner position number was assigned to each existing and new position in the legacy system by Banner.

Does EPAF replace BSU@Work?

Effective December 25, 2011, the Banner Human Resource/Payroll module became active, replacing the legacy HR/Payroll system. Self Service Banner (SSB) will allow you to obtain much of the same information you did through BSU@Work and Argos reports will provide the rest.

Creating EPAFs

How do I log in to EPAFs? What if my login fails?

You use the same user ID and password that you use to access Outlook. If your logon fails, first check your user ID and password to be sure that you are using the correct one. If you are still experiencing difficulty logging in, contact the Technology Help Desk at 5-1517.

UHRS just gave me an ID # for my new employee. Can I give it to my new employee so she/he can go to Bracken Library 311/312 to obtain a BSU ID?

Yes, the ID # will be available the same day, most likely in 2-4 hours. Banner system reports that update new ID#'s process every few hours.

A faculty/professional employee is resigning or retiring. Do I use an EPAF for this?

No. If a faculty or professional employee is either resigning or retiring, use form P-3, which can be found at:

<http://cms.bsu.edu/about/administrativeoffices/humanresources/current-employees/hrforms>

What is the "Approval Category" in EPAF?

Not to be confused with an "Approver", the "Approval Category", a required field, is simply a drop-down box that contains all EPAF types. For a list of Approval Categories (type of EPAF) please view the chart titled, "EPAF Types" at the end of this document.

Will my approvers automatically appear in the EPAF?

No, but within the EPAF menu under "EPAF Originator Summary" there is a section named "Default Routing Queues", where you can set default routing queues for any type of EPAF, which is a great timesaver. For more information, view the "Setting Routing Queues" help document located at:

<http://cms.bsu.edu/about/administrativeoffices/humanresources/banner-user-guide/banner-epaf-general-information>

What is the difference between "Approve", "FYI", and "Apply" in the Routing Queue section under "Required Action"?

"Approve" – If used, each level of approver must select "approve" before the next approver can perform a required action. Keep in mind that the more approvers with "approve" selected as the required action, the longer it takes for the EPAF to move through the process.

"FYI" – provides notice that the EPAF is in process. The individual may acknowledge it. The EPAF moves through the process more quickly than requiring an actual approval, while the individual at that approval level still receives information about the action.

"Apply" – is the final step of the EPAF process, executed in either HR or Payroll, this transfers information from the EPAF into INB (Internet Native Banner)

What is an Applier?

Only University Human Resource Services and Payroll function as appliers. This means that they actually move the information in the EPAFs into Banner. Payroll applies all administrative EPAFs (ADM300, ADM301, ADM400, and ADM500), undergraduate and graduate student employee EPAFs, and UHRS applies the EPAFs for all other types of employees.

How do I know who to select as an Approver?

Each department is responsible for selecting their own approvers. Keep in mind that the more approvers you include on an EPAF, the longer it takes to move through the process. Please consider using “FYI” instead of “Approve” as the Required Action in the Routing Queue. Although HR can’t determine who the required approvers are for your area, the chart below is a general guideline to use when considering approvers:

SELECTING APPROVAL LEVELS FOR EPAFs		
Staff and Service*	Professional	Faculty
<ul style="list-style-type: none"> • DO NOT include President • Administrator, Manager, Director (or whoever is the hiring supervisor) • Department Chair (or department head if not the hiring supervisor) • College Budget Director (if applicable or if not the Budget Office) • Dean or Assoc. Dean whichever your College has determined will be used. (if applicable) • Contracts and Grants (if applicable) • Vice President (if in Academic Affairs select the Provost) • Your HR Representative in Pre-Approval HR • Payroll FYI (Shana Rogers) • Cindy Dillingham in HR as the Applier 	<ul style="list-style-type: none"> • President approves all Professional EPAFs with a total pay amount of <u>\$5,000.01 or higher</u> • Director (if applicable) or • Department Chair (if applicable) • University Compliance • Vice President (unless Academic Affairs, then select Provost) • Budget Office or College Budget Director • Contracts and Grants (if applicable) • Your HR Representative in Pre-Approval HR for <u>Primary</u> Assignments or Teresa Pryor for <u>Secondary</u> Assignments • Payroll FYI (Shana Rogers) • Teresa Pryor in HR as the Applier • If Division of Online and Distance Education is reimbursing, add John Burton 	<ul style="list-style-type: none"> • President approves all Professional EPAFs with a total pay amount of <u>\$5,000.01 or higher</u> • Department Chair (if applicable) • College Budget Director • Dean (except in CSH, use Assoc. Dean) • Contracts and Grants (if applicable) • Your HR Representative in Pre-Approval HR for <u>Primary</u> assignments or Teresa Pryor for <u>Secondary</u> assignments • Provost • Payroll FYI (Shana Rogers)-- • Teresa Pryor in HR as the Applier • If Division of Online and Distance Education is reimbursing, add John Burton

How will my approver know there is an EPAF awaiting his/her approval/acknowledgement?

Each day at 3:00 PM an email will be sent to each approver from erphr@bsu.edu notifying an approver that they have EPAFs waiting in their queue. A user can also check their queue manually by logging into their account. Emails are also sent when an EPAF is returned for correction or cancelled.

Can an approver make changes to an EPAF?

No. The EPAF must be returned to the originator for corrections. The originator will make the changes, update the EPAF, and resubmit for approval.

If my approver wants to set me up as a Proxy - how do I do this?

To act as a proxy for an approver, there are two steps that need to be completed:

1. Setting up a Proxy – executed by the Approver

First, before the approver can set up someone as his/her proxy, he/she must have an EPAF waiting in the queue.

- Log in to SSB
- Click on *Employee*
- Click on *Electronic Personnel Action Forms*
- Select *EPAF Proxy Records*
- Then choose the appropriate Approver Level
- Select the name of your proxy
- Click on *ADD*

2. Act as a Proxy – executed by the Proxy

- Log in to SSB
- Click on *Employee*
- Click on *Electronic Personnel Action Forms*
- Choose *Act as a Proxy*
- Next to *Proxy for* choose the approver's name that designated you as a proxy
- DO NOT check the box next to *Act as a Superuser*
- Enter Submitted from and Submitted to dates (can be from today to today, or a date range, or you can leave it blank – depends on when the EPAF was done that you need to approve)
- Transactions per page (your choice)
- Click on *GO*

What's an "E-Class"?

This is an employee class or a type of employee. As in the legacy system, employee types are designated as faculty, non-exempt staff, exempt staff, professional, service, temporaries, student employees and graduate assistants:

EMPLOYEE E-CLASS
A1 Affiliated Service FT Benefits Eligible
B1 Bargaining Unit FT Benefits Eligible
B2 Bargaining Unit PT No Benefits
E1 Exempt Staff FT Benefits Eligible
E2 Exempt Staff PT No Benefits
F1 Faculty Tenure or Tenure Track Benefits Eligible
F2 Faculty Contract PT Benefits Eligible No Retirement
F3 Faculty Contract FT Benefits Eligible
F4 Faculty Semester PT No Benefits
F5 Faculty Semester FT No Benefits Receive Sick
F6 Faculty Summer Semester
H1 Hourly Professional FT Continuing Contract Benefits Eligible
H2 Hourly Professional PT Continuing Contract Benefits Eligible
H3 Hourly Professional FT Contract Benefits Eligible
H4 Hourly Professional PT Contract Benefits Eligible
H5 Hourly Professional FT 10 mth. Benefits Eligible
LR LTD Retiree Post Emp Benefits Eligible Varies
N1 Non Exempt Staff FT Benefits Eligible
N2 Non Exempt Staff Reg PT No Benefits
P1 Professional FT Continuing Contract Benefits Eligible
P2 Professional PT Continuing Contract Benefits Eligible
P3 Professional FT Contract Benefits Eligible
P4 Professional PT Contract Benefits Eligible
P5 Professional FT 10 mth. Continuing Contract/Contract Benefits Eligible
S1 Student-Under Grad Hourly
S2 Student-Under Grad Salary*
S3 Student-Graduate Asst Salary*
S4 Student-Graduate Asst Hourly
TB All Temporary Bi-Weekly No Benefits
TM All Temporary Monthly No Benefits
TF All Temporary Secondary Faculty Assigns No Benefits
*Hourly/Paid Bi-weekly

How are position numbers assigned to new positions?

Position numbers are assigned by the Banner system on a “one-up” basis. The Banner position number itself does not indicate the type of position it is or the type of employee to which it will be assigned. Instead the E-class and position class in which the position belongs indicates the type of position it is and the type of employee who will occupy that position.

I understand that position numbers have been created for my area and I can search for those under a specific Employee Class in my area. How do I do that?

There are two ways to do this. The first way is to go to the UHRS web page and click on Banner User Guide and then Position Numbers with FOAP. This brings up a searchable PDF that is updated monthly and sorted by organization.

The second way is to go into any EPAF other than an ADM one and enter a query date and an active employee’s BSU ID. Then, go to the next section where it asks for the position number. In this section, use the hourglass to search and select the appropriate E-class and your organization code. A list of position numbers that were available in that E-class category will appear. You can print that screen for your records. Then, you can exit by clicking “Return to the EPAF Menu”. Also, when you use these numbers, be sure that the account number in the labor distribution section does not contain “XXXXXX”. If this occurs, please e-mail erphr@bsu.edu.

What is a “Query Date”?

The Query Date field appears at the beginning of every EPAF, and automatically defaults to the date the EPAF is created. This field should reflect the date the action on the EPAF is to become effective on all EPAFs. Once you begin an EPAF and move to the next section by clicking “Go”, you cannot go back to change the Query Date. If you find that you need to revise your Query Date, delete or void your EPAF (depending on its status) and start a new EPAF.

There are three date fields in the NBAJOBS section of the EPAF (Job Begin Date, PAF Effective Date, and Personnel Date). What is the difference?

Job Begin Date: is the date the job assignment on the EPAF begins unless the employee has previously occupied this position. An example would be a contract faculty member whose job begins and ends each year but the position number remains the same. If the employee has been in the position before, this field does not have to be populated. However, if it is, the date in the “New Value” column must equal the Job Begin Date in the “Current Value” column or an error will be encountered when submitting the EPAF.

PAF (EPAF) Effective Date: is a date that reflects when the EPAF is effective. This field may appear twice on an EPAF – once on the “Job Information” section which indicates when the job begins and once on the “End a Job Assignment” section which indicates when the job ends. Remember if the EPAF is for a monthly paid employee this date

needs to be the first date of the pay period and the last date of the pay period *unless the pay is to be prorated as with a new professional employee whose first day of work is not the first of the month.*

For example a new faculty assignment that begins fall semester would have August 1 and December 31 in these fields even though the semester may not begin until August 17 and may end on December 14.

Personnel Date: does not affect pay but serves as an information field for historical, audit or reporting purposes. It is in both the “Job Information” section of EPAFs and the “End Job Assignment” section. It should be completed in both sections to indicate when the work actually begins and ends. However, only on MTH107 will the EPAF not submit if this field is not populated in both sections.

An example of what should be entered in this field on a new faculty assignment would be the actual semester begin date such as August 17, for a fall semester, and the actual semester end date such as December 14. On many bi-weekly EPAFs, if this date is retro (in the past) it alerts Payroll to the possibility that a retro action may be necessary (i.e., shift changes or change in pay rate).

End Date: is a date that *only appears if the EPAF has an “Additional Earnings” section.* The End Date field is different than all other date fields in Banner, and if not populated correctly will affect pay. The date in this field must be the first day of the month following the end of the assignment because this date is connected to the use of an earnings code.

For example if the PAF Effective Date in the “End Job Assignment” Section of the EPAF is May 31, 2013, then this date needs to be June 1, 2013 or the payment will be reduced by an amount equal to one day.

What does “Current Value” mean in an EPAF?

The “Current Value” column will populate once the EPAF is saved. This is helpful in determining the new dates for the “New Value” column. The “Current Value” column reflects the most current Banner information for the employee.

What does “COA” mean?

“COA” means Chart of Accounts. For now, this is “1” university-wide.

What is the “Step” field?

This is only used for service employees in the bargaining unit or associated with the bargaining unit. Step 1 is the new hire or beginning rate for this type of employee. Step 2 is the 2 year rate for this type of employee and Step 3 is the 5 year rate. When changing a rate for an existing biweekly staff employee, the step must be 0.

Why would I need to complete the “Comments” section in an EPAF?

To provide information that might be helpful to approvers or appliers. For example:

- Specifying that this is a teaching assignment for Online and Distance Education.
- Specifying the number of faculty load hours for this teaching assignment.
- Specifying that the graduate assistantship is either full-time or half-time.
- Specifying that you are entering a retroactive action for an employee.
- It is important to include the entire monetary amount, especially if spread out over 3, 4, or 5 months.
- Other general comments that you would have put on an NOA. The more information provided, the more telephone calls can be eliminated.

In the “End a Job Assignment” section on an EPAF, does Job Status “Terminated” mean I’m terminating the employee?

No. You are only terminating, or ending, the employee’s job assignment. Only UHRS can perform the termination process of an employee in Banner.

How do I pay someone from a grant?

Be sure you know the complete FOAPAL for the grant before you begin the EPAF. Then enter this FOAPAL in the “Labor Distribution” section of the EPAF. **Note:** The Contracts and Grants Office submits most of the EPAFs for grant funded assignments.

If you are hiring a former graduate student as a contract faculty, will he/she keep his/her current BSU ID#?

Once an ID # has been assigned to an individual that number will be the same, regardless of the student's or employee's status at the university.

How do I see my history of EPAF transactions?

This is available on the “History” tab of your EPAF “Originator Summary” (or your “Approver Summary” if you are an Approver). EPAFs are shown under “Current” tab are waiting. If you are an Approver the ones showing under your “In the Queue” tab have been submitted but not yet reached you for approval. On any of the tabs, you can sort them by the field of your choice.

Remember once you submit your EPAF and see the message that your EPAF was submitted successfully, it is your responsibility as the creator of the EPAF to ensure it reaches its final stage, which is “Completed.” Check your EPAF “Originator Summary” frequently for the status or approval progress of EPAFs you have submitted, and to check for any EPAFs that have been returned for correction or voided. In some cases, you may receive an email from HR with a status regarding a returned or canceled EPAF, but it is always best to monitor your EPAF “Originator Summary” for actions that have occurred.

I know I've made mistakes, and I want to start over on my EPAF. Can I do that?

There are several stages where you may **delete, cancel or void** an EPAF:

EPAF Status	Transaction Status in your EPAF Originator Summary:	Actions Available:
Not saved		Back out or return to EPAF Main Menu– it will not be saved
Saved	Waiting	Delete – it will be removed from SSB
Submitted	Pending	Approvals are pending. EPAF can be either approved or returned to you for correction by approver, or you can void it before the first approval occurs. (You can still view in your Originator Summary)
	Approved	All approvals done but not applied. It can still be returned for correction. (You can still view in your Originator Summary)
	Completed	All approvals done and EPAF has been applied. You can only “Cancel Transaction” at this point (You can still view in your Originator Summary) <u>Please do not cancel a non-student employee transaction unless you have previously discussed doing so with UHRS.</u>

EPAF Tips and Tricks

- **Save your EPAF!**
 - Your EPAF screen will time out after 90 minutes of inactivity. Be sure to save your EPAF frequently so it will remain in the system.
 - You may want to submit your EPAF before you log out, but you may simply save it and come back later to submit it.
- **In many of the EPAFs, you will be asked for the Supervisor's ID #**
 - At the beginning of the EPAF you can look up the supervisor's ID for the employee on which you are initiating an EPAF by clicking on the search icon next to the “ID” field and then entering the supervisor's name. This way you will be prepared when you need to enter it later in the EPAF. You can write it down or copy and paste it.
- **The Date Field format is always MM/DD/YYYY.**
- **When entering salary or hourly wage information, don't include “\$” or “,”.**
- **Use the wild card function when searching for names using the EPAF search function.**

It allows for a broader search – “%” is the wild card character. For example, if you want to look for all people whose names begin with “Joh”, you can use “Joh%” to perform a search.

- **What do the red asterisks mean in the EPAF fields?**
A red asterisk indicates a required field in an EPAF.
- **When entering an EPAF to renew an assignment for a contract semester faculty** in the “Job Information” section of the EPAF, select “BGSMA” - Begin Semester Assignment as the “Job Change Reason.” Then, in the “End a Job Assignment” section, select “ENDJB” - End of Job, as the “Job Change Reason.” **When renewing a contract professional**, in the “Job Information” section of the EPAF, select “CNTRE” - Contract Renewal, as the “Job Change Reason.” Then, in the “End a Job Assignment” section, select “ENDJB” - End of Job, as the “Job Change Reason.” **If extending a temporary assignment for faculty or professional**, enter “CONT” – Continuation as the “Job Change Reason.” Then, in the “End a Job Assignment” section, select “ENDJB” – End of Job as the “Job Change Reason.”
- **When selecting an account number under the “Labor Distribution” section in the EPAF**, keep in mind that you will need to select from only the account numbers that begin with “6”. These are labor account numbers.
- **Dates for GA’s in EPAF need to correspond with payroll cycles not actual days worked.** The pay schedule for Graduate Assistants can be found at the payroll website: <http://cms.bsu.edu/about/administrativeoffices/payrolleb/payroll/paydates>

When in doubt, ASK!

- For questions regarding non-student EPAFs, contact your assigned Super Administrator, your College’s budget director, or send an email to erphr@bsu.edu
- For questions regarding student EPAF’s contact John Knox at 5-2432.
- For questions regarding graduate assistant EPAF’s, contact Linda Conwell at 5-1301

EPAF TYPES

<u>Category Code</u>	<u>Description</u>	<u>Self-Service Description</u>
ADM300	ADM-General Title Change	Administrative – General Title Change
ADM301	BW,GA,MTH,STU-Change in Labor	Administrative – Change in Labor
ADM400	BW,GA,MTH,STU - End Job Asmt	Administrative – End of Job Assignment – NOT to be used to end a FACULTY or PROFESSIONAL ASSIGNMENT
ADM500	ADM-Admin Chg Supv or Org	Administrative – Change of Supervisor or Org
BWK103	BW - Add a Secondary Job	BW – Add or Reactivate a Secondary Job
BWK115	BW-Temp Job Assignment	BW-Temp Job Assign Ongoing or w End Date
BWK201	BW - Change Base Pay	BW – Change Base Pay
FAL107	Fall Semester	Fall Semester
GA120	GA-New Stipend	GA-Graduate Assistant-New Stipend Hire
MTH102	MO-Contract Assignment	MO-Contract Assignment-Faculty AY, Semester
MTH107	MO - Addl Comp w Labor	MO – Additional compensation w Labor, Summer, Ret, TM, TF, & F6
MTH115	MO-New Job Assignment Fac	MO-New Job Assign Ongoing or w End Date-TT
MTH201	MO - Change Base Pay	MO – Change Base Pay
MTH300	MO - Additional Earnings	MO – Additional Earnings (Existing Job-no Grants)
SPR107	Spring Semester	Spring Semester
SS1107	Summer 1	Summer 1
SS2107	Summer 2	Summer 2
SSM107	Summer Full Semester	Summer Full Semester
STU110	Student – New Hire	Student – New Hire
STU115	Stu – New Stipend Hire	Student – New Stipend Hire
STU201	Student – Change Base Pay	Student – Change Base Pay

Rev. 3/2017