# Electronic
Personnel Action Form

Setting Approver Preferences

The purpose of this document is to help you learn how to set default approvers for each type of Electronic Personnel Action Forms (EPAFs). This document assumes you have a basic knowledge of accessing and navigating SSB.

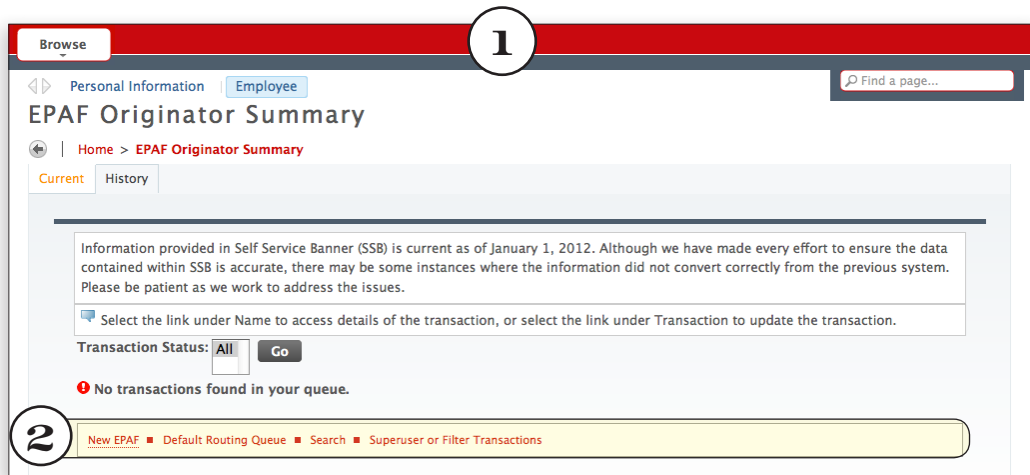# Electronic Personnel Action Form
Setting your default approvers for the EPAFs used
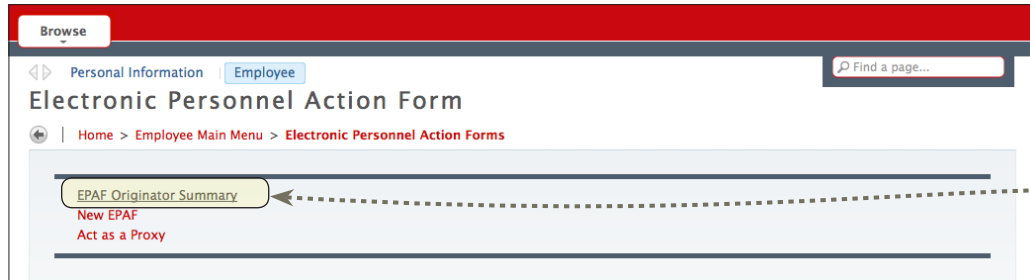
To eliminate some steps in this process, take a moment to set your default approvers. Here's how you do it.
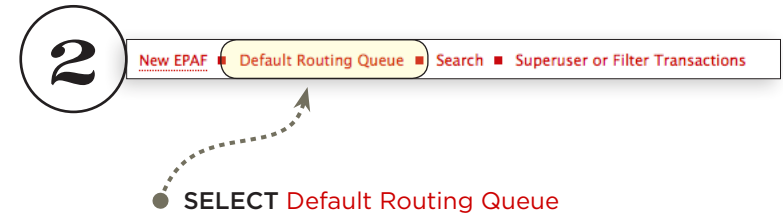
With the EPAF menu open in your browser's window, **SELECT** EPAF Originator Summary

1 If you have not completed any transactions, the screen will look similar to this example.

For now, the objective is to find the EPAF Menu on this screen. If you have completed EPAF transactions, you may see them listed here and you may need to scroll down a bit to find the menu we need.

2 New EPAF ■ Default Routing Queue ■ Search ■ Superuser or Filter Transactions

SELECT Default Routing Queue

Selecting this option takes you directly to the Approval Category menu and the Approval Queue menu.

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Electronic Personnel Action Form
Setting your default approvers for the EPAFs used

You can set the default approvals for each Approval Category. This action will save you steps in the long run, especially if you complete and submit EPAF transactions often.

First, determine which Approval Categories you will use most often.

③ **SELECT** an Approval Category from the menu.

If you are not sure what to choose, go to the last page of this document and review EPAF Terms, Approval Categories, Abbreviations, and the Reference Key.

④ **SELECT** Go.

Do not skip this step!

The browser's screen may blink as the content on the screen refreshes.

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Setting your default approvers for the EPAFs used

5 With an Approval Category chosen and GO selected you will notice that some Approval Level boxes have been populated with approvers. These approval steps are required for the selected category and you must select a name for each approval level.

6 **SELECT** the magnifying glass next to each Approval Level to assign the appropriate person to each task and route the EPAF through its approval queue.

7 Use the remaining boxes to fill in your area's unique approval queue. Think about when you completed the paper process, who needed to approve personnel changes in your area. Your immediate supervisor, manager, or director; the college dean, or vice president?

If you are not sure who to select, consult with your immediate supervisor to determine the appropriate people to place in the approval queue for your EPAFs.

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Setting your default approvers for the EPAFs used

Personal Information | Employee

EPAF Default Routing Queue

Home > **EPAF Default Routing Queue**

Find a page...

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category: **MO – New Job Assignment Ongoing, MTH100** | **Go**

Approval Queue

Approval Level	User Name	Required Action
650 – (PAPHR) Pre-approval HR	Select a name from the menu	Approve
770 – (PAYFYI) Payroll Fyi	Select a name from the menu	FYI
800 – (UHRS) Human Resources	Select a name from the menu	Apply
	Select a name from the menu	Not Selected

The Approval Level, User Name and Required Action are linked together like a chain.

If one box is left empty in the chain of approvers, you will get an error and the EPAF will not be processed.

Make sure the Approver Level, the person's name, and the action is complete.

Approval Level menu (item 8):
Not Selected
100 – (ADMIN) Administrator
140 – (STMPOF) Student Emplymt Ofc
200 – (MGR) Manager
250 – (PRNINV) Prin Investigator
300 – (ATDIR) Asst Director
330 – (ACDIR) Assoc Director
350 – (DIR) Director
380 – (CHAIR) Chair
400 – (SEE) Sch of Extended Educ
420 – (FIELD) Field Studies
440 – (CLBDGT) College Budget Dirs
460 – (ACDEAN) Asst,Assoc Dean
480 – (DEAN) Dean
500 – (CONGRT) Contracts and Grants
530 – (ATACPV) Asst, Assoc Provost
550 – (ATVP) Asst Vice President
570 – (ACVP) Assoc Vice President
600 – (VPRES) Vice President
620 – (BUDGET) Budget Office
630 – (GRAD) Graduate School
650 – (PAPHR) Pre-approval HR
700 – (PRVST) Provost
730 – (COMPL) Univ Compliance
770 – (PAYFYI) Payroll Fyi
780 – (PRES) President
800 – (UHRS) Human Resources
900 – (PAYRLL) Payroll

nic Approval Category Form (NTRACAT).

Valid Values (item 9):
Valid Values
bsu.edu https://ssb-test.bsu.edu:9006/pls/TESTC/bwpkepaf.F

Search: ___ Go

User Names,
600 – Vice President

Akin, T. W. H. (BSU000791242)
Bales, Vera K. (BSU000790876)
Howard, Randy B. (BSU000822301)
King, Terry S. (BSU000822157)
Lang, Jeffrey R. (BSU000823285)
Purcell, Philip M. (BSU000799136)
Repp, Philip C. (BSU000781100)
Taylor, Thomas R. (BSU000821811)

Select

Required Action menu (item 10):
Not Selected
Not Selected
Approve
FYI
Apply

8 SELECT the Approval Level menu. This menu lists the various roles on campus. Select the role which matches the approver's name you plan to add.

For example, if you know the Vice President for your area should be an approver, you would select

600 - (VPRES) Vice President

from the Approval Level menu, and then

9 SELECT the magnifying glass to find his/her name from the User Name menu that appears.

10 Next, you must SELECT the action you need this approver to perform.

In most situations, you will select **APPROVE**

After you have completed all of the steps, **SELECT SAVE**

When save is selected, the approval queue will be saved to the selected Approval Category. Since the selected category is, **MO - New Job Assignment Ongoing, MTH100,** the next time this EPAF is used the Approval Queue will automatically be filled with this group of approvers.

After Save is selected, the approval order changes to show your approvers first, followed by payroll and UHRS approvers.

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Electronic Personnel Action Form

EPAF Terms, Abbreviations, and Reference Key

Before you begin, take a few moments to become familiar with the terms used throughout this process.

You will need to know

➤ Employee classification codes

➤ The organization (FOAPAL) code for your department

➤ The position code, or where to get it

➤ How to search for people

Term Abbreviations

BE	Benefits Eligible
COA	Chart of Accounts
Cont	Continuing
Contrt	Contract
FT	Full Time
LTD	Long Term Disability
NB	No Benefits
PT	Part Time
Rec	Receive
Reg	Regular
Rtmt	Retirement
Sck	Sick Pay

EMPLOYEE CLASS

A1	Affiliated Service–FT BE
B1	Bargaining Unit–FT BE
B2	Bargaining Unit PT No Benefits
E1	Exempt Staff–FT BE
E2	Exempt Staff–PT No Benefits
F1	Faculty Tenure or Ten Track–BE
F2	Faculty Contract–PT BE No Rtmt
F3	Faculty Contract–FT BE No Rtmt
F4	Faculty Semester–PT No Benefit
F5	Faculty Semester–FT NB Rec Sck
LR	LTD Retiree Post Emp–BE Varies
N1	Non Exempt Staff–FT BE
N2	Non Exempt Staff Reg–PT NB
P1	Professional–FT Cont Contrt BE
P2	Professional–PT Cont Contrt BE
P3	Professional–FT Contract BE
P4	Professional–PT Contract BE
P5	Professional FT 10 mth Cont Contract BE
S1	Student-Under Grad Hourly
S2	Student-Under Grad Salary*
S3	Student-Graduate Asst Salary*
S4	Student-Graduate Asst Hourly
TB	All Temporary BiWeekly–NB
TM	All Temporary Monthly–NB

Hourly/*Paid Bi-Weekly	Salary/Paid Monthly

APPROVAL CATEGORIES

Administrative—General Title Change, ADM300

Administrative—Change in Labor, ADM301

Administrative—End Job Assignment, ADM400

Administrative—Change of Supervisor or Org, ADM500

BW—New Job Assign Ongoing or w End Date, BWK115

BW—Add or Reactivate a Secondary Job, BWK103

BW—Change Base Pay, BWK201

GA— Graduate Assistant-New Stipend Hire, GA115

MO— Contract Assignment-Faculty AY, Semester, MTH102

MO— New Job Assign Ongoing or w End Date-TT, Prof, MTH115

MO— Additional compensation with Labor, Summer, Ret, & TM, MTH107

MO— Change Base Pay, MTH201

MO— Additional Earnings (Existing Job-no Grants), MTH300

Student—New Hire, STU110

Student—New Stipend hire, STU115

Student—Change Base Pay, STU201

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