Electronic Personnel Action Forms (EPAF)

Timesheet Org Change (JATORG)

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Document Updates

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The New Mexico State University Policy Manual, **Chapter 2** General Operating Policies, Section 2.90 contains specific information related to disclosure of records and information.

Examples in this manual may have personal data altered or blacked out to ensure privacy.

What is an EPAF?

An Electronic Personnel Action Form (EPAF) is used to originate electronic documents needed to process personnel actions, such as hiring transactions and changes to existing job data.

EPAF is a Banner module that was designed to accommodate a more efficient approval signature process for centralized and decentralized HR operations or actions. It improves and simplifies the process for completing and approving a wide range of Personnel Action Forms (PAFs) for all employee types.

EPAF actions are originated electronically by the various departments within the university to communicate employment decisions about their employees to the HR and Payroll department. They are then electronically routed to the appropriate approvers. Once approved, they are applied to Banner directly by a central process.

EPAF is fully electronic (Web-based) and EPAF actions can be created and routed using Banner Employee Self-services (ESS) which is accessible through myNMSU. Access to EPAF is not granted to all NMSU employees; it is only for those employees who have been designated in the system as EPAF originators and/or approvers.

The type of EPAF you create depends on the change you are making. Additional EPAFs will become available in the system as they are developed. The different types of EPAFs are classified as "Approval Categories". In addition to general functions of EPAF, this document describes how to process student employee hiring actions in the HSHIR Approval Category.

EPAF key features

Default values
The EPAF system populates default field values based on the EPAF category selected as well as information obtained from Banner, such as previous job and employee record information.

Most default values can be changed if needed, however some values are automatically populated and cannot be changed. Fields that cannot be changed are indicated as **not enterable** next to the field label.

Default values are a benefit because they save time when completing EPAFs for the most common types of transactions.

Lookup fields
Lookup fields are used to search and select appropriate values for a field. EPAF integrates with Banner data in order to help find a variety of values, such as values related to employees, organizations, and positions. Lookup fields are indicated by a magnifying glass icon.

Field validation (error checking)
EPAF uses a two stage validation check that examines entered values to determine if the values are valid given information about the transaction that you have provided. For example, EPAF validates effective and personnel dates based on the job change reason you have selected.

If an EPAF transaction fails validation a message will display indicating the details about the failed validation and how to resolve the issue. There are three types of validation messages, *Error* messages, *Validation* messages and *Warning* messages. Validation messages indicated as **ERROR** or **VALIDATION** must be corrected in order to submit the EPAF for approval. Validation messages indicated as **WARNING** should be noted; however you may submit the EPAF for approval if a warning message exists.

An error will prevent you from submitting the EPAF until the error is corrected, but you can still save the EPAF if errors are present.

How to access EPAFs

What you should know before you begin the EPAF process

As you begin an EPAF the system will require specific information about the transaction that you should gather ahead of attempting to originate an EPAF. Specifically, you should know the following details about the transaction, or obtain this information, before you create a new EPAF.

- Aggie ID (ex. 800XXXXXX)
- Personnel Date (date of the change to the TORG)The position number for the position that will be updated
- Time Sheet Org Number
    - Banner Info Lookup (http://af.nmsu.edu/banner-lookup/)
        - The Banner Lookups are now accessible within Cognos. To use Cognos you must successfully logon by providing your credentials: MyNMSU Username and Password. Additional security setup is not required to access the Banner Lookups. Links to the Banner Lookups are also available through my.NMSU.edu under Cognos Reporting.
        - Click here to access the Banner Lookups (https://cognos-p.nmsu.edu/cognos/cgi-bin/cognosisapi.dll)
    - Once you are logged into Cognos, the Banner Lookups can be accessed from the Support Tab by clicking on the Banner Lookups link under the Cognos Support menu. If you are an existing Cognos user, the Banner Lookups can also be found as a quick link under the NMSU tab.
- Access is required to use the EPAF system. Please download, complete, and route the security form to gain access to the system:
    - Electronic Personnel Security Request Form (http://hr.nmsu.edu/forms/)

Access EPAF through my.nmsu.edu using your browser

Please Note:

Internet Explorer is not supported. We recommend using an alternate browsers such as the latest versions of Mozilla Firefox, Google Chrome, or Apple Safari.

The EPAF system is accessible through myNMSU. The myNMSU portal allows you to use a single user name and password to access many of the electronic services at NMSU.

https://my.nmsu.edu
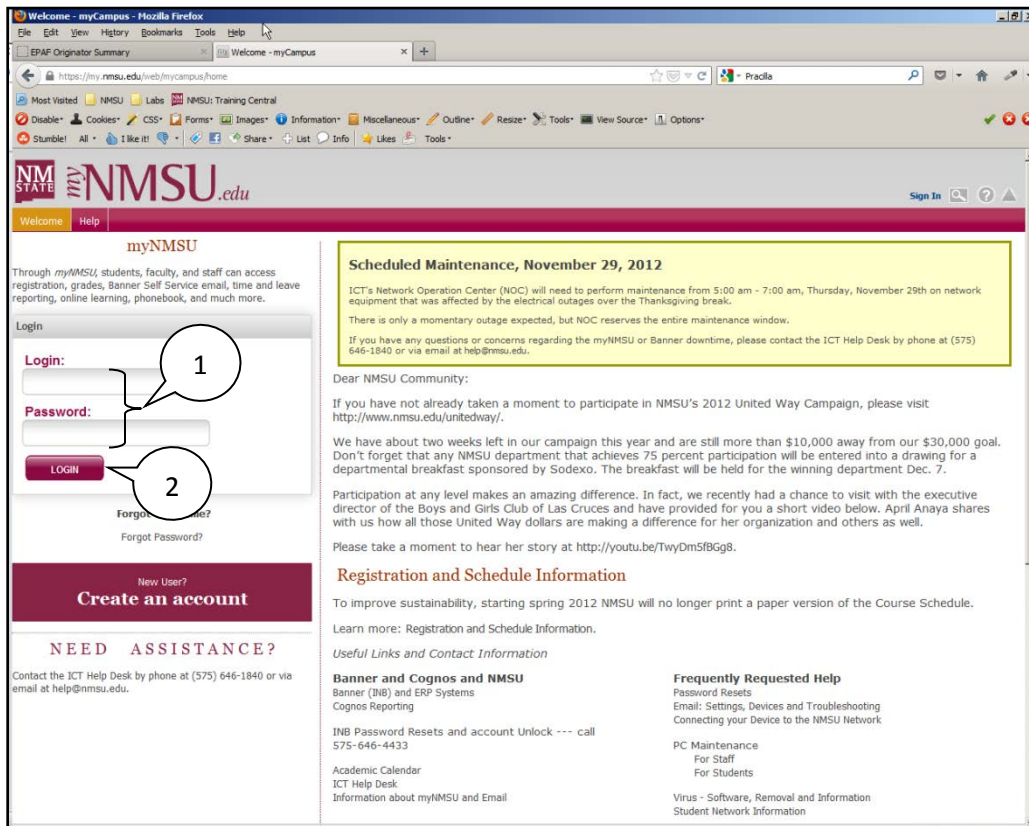
1. Enter your NMSU **User Name** and **Password**.
2. Click on the **Login** button.

3. Once logged into myNMSU, click on the **Employee** tab.

4. Click on **Employee** to open Self-Service Banner in a new window or tab.

5. Select **Electronic Personnel Action Forms**.

EPAF Categories

Categories are used to select specific data entry forms related to the personnel action you want to perform. In the following section we detail the Timesheet Org Change/JATOR category, describing each field that is available on the form including a basic description of acceptable values and relevant examples.

Timesheet Org Change/JATORG

This section describes the process of completing a **Timesheet Org Change** approval category to change the Timesheet Org for any non-regular hourly employee. This includes student regular, student work-study, and temporary exempt/non-exempt.

Has a single purpose, it is used to change hourly jobs in the Banner system. As such, there is only one form and section to complete, the NBAJOBS form job transactional information.

Creating a new JATORG EPAF

1. From the Electronic Personnel Action Form screen, click **New EPAF**.

2. Enter the Banner **ID** of the employee that will be affected by the EPAF transaction.
   - You can do a search for the Banner **ID** by clicking on the magnifying glass. Employees can be looked up using their first and last names, Banner IDs and/or SSNs**.**
3. Enter the **Query Date** (defaults to today's date). See the section labeled "How to determine the query date" for additional details about how to select the appropriate query date for the transaction.

- The query date is used to find jobs and display the job status for each job as of the query date entered. The query date is also used to default values on the EPAF detail screen.
    1. Caution: The query date defaults to the current date and this may not always be what you want.
- The query date must be earlier than or equal to the effective date for the timesheet org change.
    1. For example, if you want to change the timesheet org for the employee on 3/16/2017, set the query date to 3/16/2017.
4. Select the **Approval Category** as appropriate. In this case we are creating a *Timesheet ORG Change, JATORG*
5. Click **Go**.

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New EPAF Job Selection

1. Select the position number for the position that will be updated. If there are multiple jobs, be sure to select the position that belongs to your department.
2. Click **Go**

New EPAF Job Selection

ID:
Query Date: Mar 01, 2017
Approval Category: Timesheet Org Change, JATORG

Timesheet Org Change, JOBCTO

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	Primary	999992	00	Student Aide	T10231, TS VPBF GOLF MAINTENANCE	Aug 26, 2016		Jan 31, 2017	Active	◉

All Jobs

Go

Timesheet Org Change

The only enterable fields are Personnel Date and Timesheet Orgn.

Name and ID: **Job and Suffix:** 999992-00, Student Aide
Transaction: **Query Date:**   Mar 01, 2017
Transaction Status: Waiting   **Last Paid Date:** Jan 31, 2017
Approval Category: Timesheet Org Change, JATORG

Save   Submit   Delete

1. Enter the Personnel Date of the change

      a. The Effective Date (Not Enterable) will do one of the following:

          i. If Current Date is between 1st & 15th and personnel date that you enter is less than or equal to 15th of the current month the Effective Date will default to the 16th of current month

         ii. If Current Date is between 16th and the end of the month and personnel date that you enter is less than or equal to the end of the month date then the Effective Date will default to the 1st day of next month

        iii. If a future personnel date is entered, the effective date will equal the Personnel Date

  2. Enter the new Timesheet Orgn Number

* - indicates a required field.

Timesheet Org Change, 999992-00 Student Aide, Last Paid Date: Jan 31, 2017

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	08/26/2016	
Personnel Date: MM/DD/YYYY*	08/26/2016	
Timesheet Orgn: *	T10231	
Job Change Reason: *(Not Enterable) HSHIR		TIME
Contract Number: *		

NOTE: Only the fields that are changing are enterable.

Routing Queue Section

The routing queue specifies the approval levels and approvers for the EPAF transaction.

You can default the routing queue used for each EPAF Category to specify the approvers used for future transactions. If you set-up the default routing queue you can still specify different approvers if necessary for each transaction.

Routing Queue

Approval Level	User Name		Required Action	Remove
20 - (D/VP) Dean/VP	🔍		Approve	
99 - (PAY) Payroll	🔍		Apply	
Not Selected	🔍		Not Selected	
Not Selected	🔍		Not Selected	
Not Selected	🔍		Not Selected	
Not Selected	🔍		Not Selected	

Save and Add New Rows

The Timesheet Org Change has two routing queue levels including:

Dean/VP – Approves the transaction

Payroll – Applies the transaction to the database The Payroll level does not approve or review the transaction in any way, rather the Payroll level simply loads the EPAF records into Banner.

Only the approver selected for the Dean/VP level will review and approve the transaction.

1. Enter the User Name for each level of approver
   a. The search function can be used by clicking on the magnifying glass to the left of user name
   b. For the Dean/VP level, choose the approver in your organization that is designated to approve your department's transactions.
   c. For the Payroll approval level you may select any available approver on the search screen

Click **Save and Add New Rows** button to save your changes and populate the name of the approver
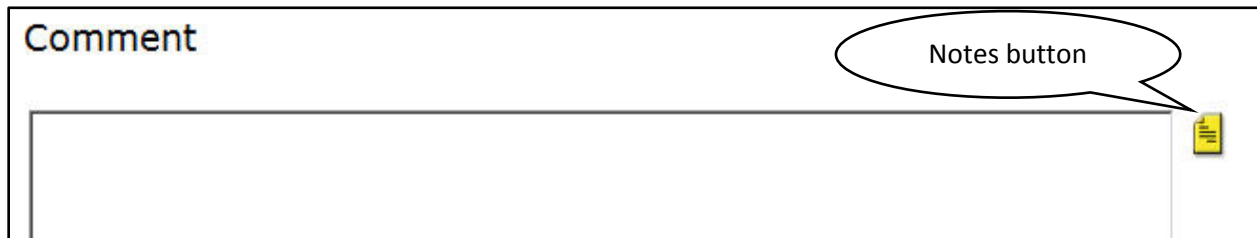
Comment

Originators add comments to the EPAF in order to provide additional information about the transaction that is not otherwise recorded in the submission form. The comments will be saved with the EPAF transaction and will be reviewed by EPAF approvers at the Dean/VP approval level. Both originators and approvers will be able to see the comments in the originator or approval summary screens respectively.

Adding comments to an EPAF

You can add multiple comments to an EPAF transaction; however comments cannot be deleted once the form is saved.

If the EPAF has already been saved with comments the comment contents will not display in the comment field. In order to see previously saved comments click the note button next to the comment field.

Comments may also be added to an EPAF by approvers. If an EPAF is returned for correction, the approver comments will provide information about why the EPAF was returned. See the section titled *Viewing Comments and Warnings* (pg. 26) for additional information about viewing EPAF comments.

Note: Comments cannot be deleted.

Save then Submit

Before you can submit an EPAF for approval you must save the EPAF.

After you click submit the EPAF will validate. If errors or warnings are generated, you will see the error messages displayed at the top of the EPAF detail screen. You will not be able to submit the EPAF until the **VALIDATION** or **ERROR** message type errors have been corrected.

Ignore error and warning messages with the message type **WARNING**. In particular, you will often see an encumbrance method warning message upon submission (pictured below). No action is required for WARNING type messages.

If the EPAF has been successfully submitted you will see a success message at the top of the EPAF detail screen.

Upon successful submission the EPAF will be routed to HR for review. The EPAF will now be on your EPAF Originator Summary screen under the History tab.