

Electronic Personnel Action Forms (EPAF)
Hiring Temporary Exempt and Non-Exempt Employees

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Document Updates

Version	Date	Notes
1.0	11/18/2013	Initial Version
1.1	11/27/2013	Updated annual salary information in Supplemental Compensation EPAF to indicate that this is the prorated, not total, salary for the employee.
1.2	12/12/2013	Updated Hiring toolkit links.
1.3	04/08/2014	Corrected grammatical errors
1.4	04/17/2014	Updated screen shots for EPAF job selection screen
1.5	12/08/2014	Updated screen shots to remove next approval type button
1.6	1/28/2015	Updated Current Hire Date information in PEAEMPL section
1.7	2/18/2015	Updated information regarding hires that occur for one day
1.8	6/24/2015	Added browser support section (no support for IE).

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Information Non-Disclosure at NMSU

New Mexico State University maintains the confidentiality and security of records in compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA), the Health Insurance Portability and Accountability Act (HIPPA), and the Gramm-Leach-Bliley Act GLBA), in addition to other federal and state laws. These laws pertain to the security and privacy of personal academic, medical and financial information, along with identifying information such as social security numbers.

Family Educational Rights and Privacy Act of 1974 (FERPA) Policy:

<http://research.nmsu.edu/compliance/IRB/resources.html#3>

FERPA protects students' records. FERPA requires post-secondary educational institutions and agencies to conform to fair information practices in their handling of student data. Among the provisions of the act are the requirements that data be used only for intended purposes and that those responsible for student data take reasonable precautions to prevent misuse of it. Examples include Social Security Numbers, grades, date of birth, etc.

Health Information and Portability Accountability Act (HIPAA):

<http://research.nmsu.edu/compliance/IRB/resources.html#7>

HIPPA protects all medical records and other individually identifiable health information used or disclosed in any form, whether electronically, on paper, or orally.

Gramm-Leach-Bliley (GLB) Act:

<http://www.nmsu.edu/manual/documents/07-29-09-policy-manual-final020110.pdf>

GLBA protects private, non-public information of individuals. Private, non-public information consists of information such as name, Social Security Number, date and location of birth, gender, credit card numbers and driver's license numbers.

Within NMSU, employees are authorized access to University records only to the extent necessary to perform their official university duties, and are responsible for protecting such information against unauthorized access or disclosure.

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 Self-service (BSS) 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 Temp Non-Exempt, Temp Exempt, and Supplemental Compensation Hiring actions.

EPAF key features


Default values

The EPAF system populates default field values based on the Approval 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 prior to originating an EPAF. Specifically, you should know the following details about the transaction, or obtain this information, before you create a new EPAF.

- AggieID (ex. 800XXXXXX) of the person to be hired *
- Personnel date of the person to be hired (the date the person will report to work)
- The position number for the position that will be filled

* If the person you are hiring does not have an AggieID or they have never worked for the university, please complete the New Hire form on the HRS Web site (<http://hr.nmsu.edu/managers/newhire/>).

Access is required to use the EPAF system. Please download, complete, and route the security form to gain access to the system:

<http://af.nmsu.edu/forms/>

Processing Toolkit – The Processing Toolkit is a collection of resources that provides details about hiring student employees, including information about regular and work-study employment processing using EPAF.

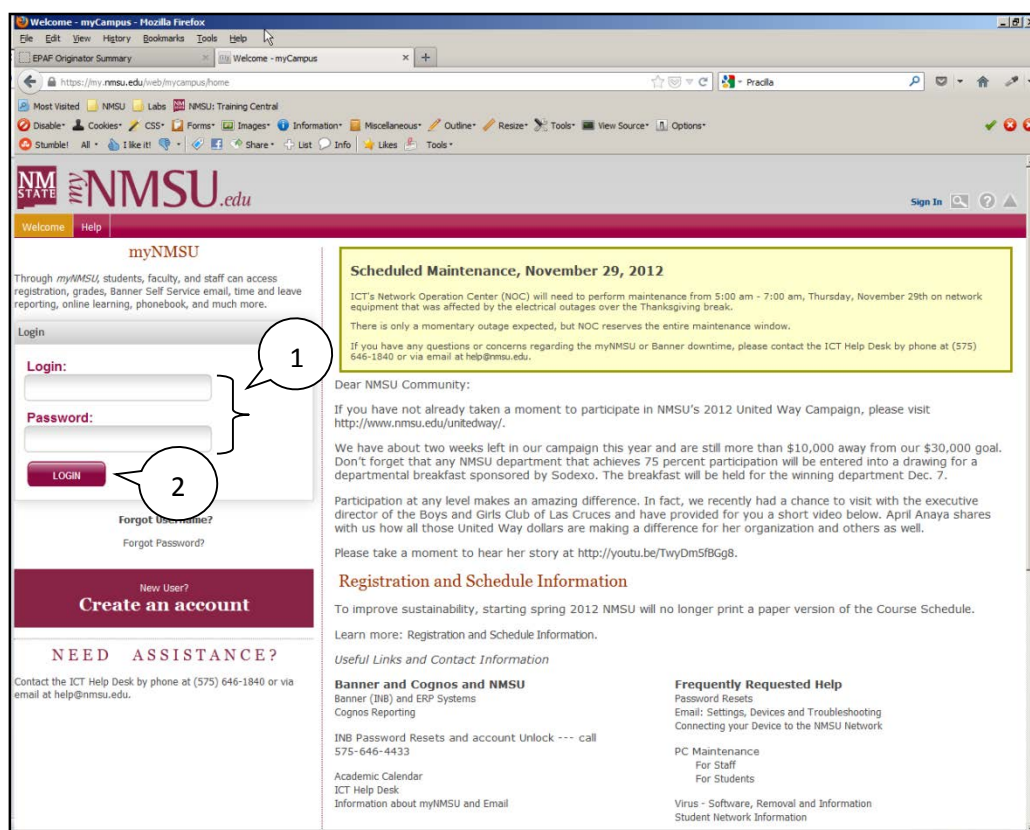
<http://hr.nmsu.edu/toolkits/>

Access EPAF through my.nmsu.edu using your browser

Please Note:

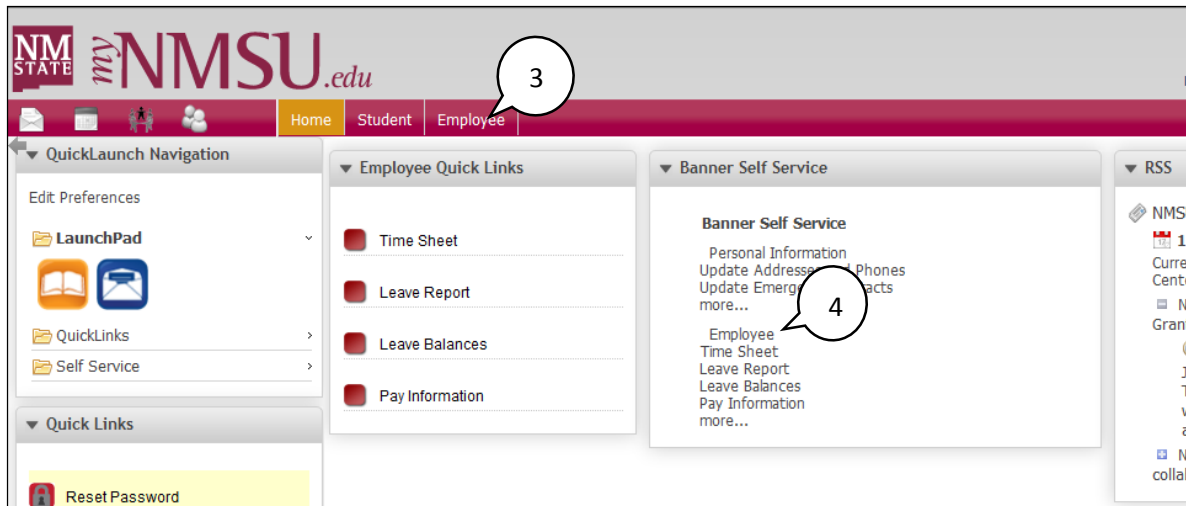
Internet Explorer is not support. We recommend alternate browsers such as the latest versions of Mozilla Firefox, Google Chrome, or Apple Safari.

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.

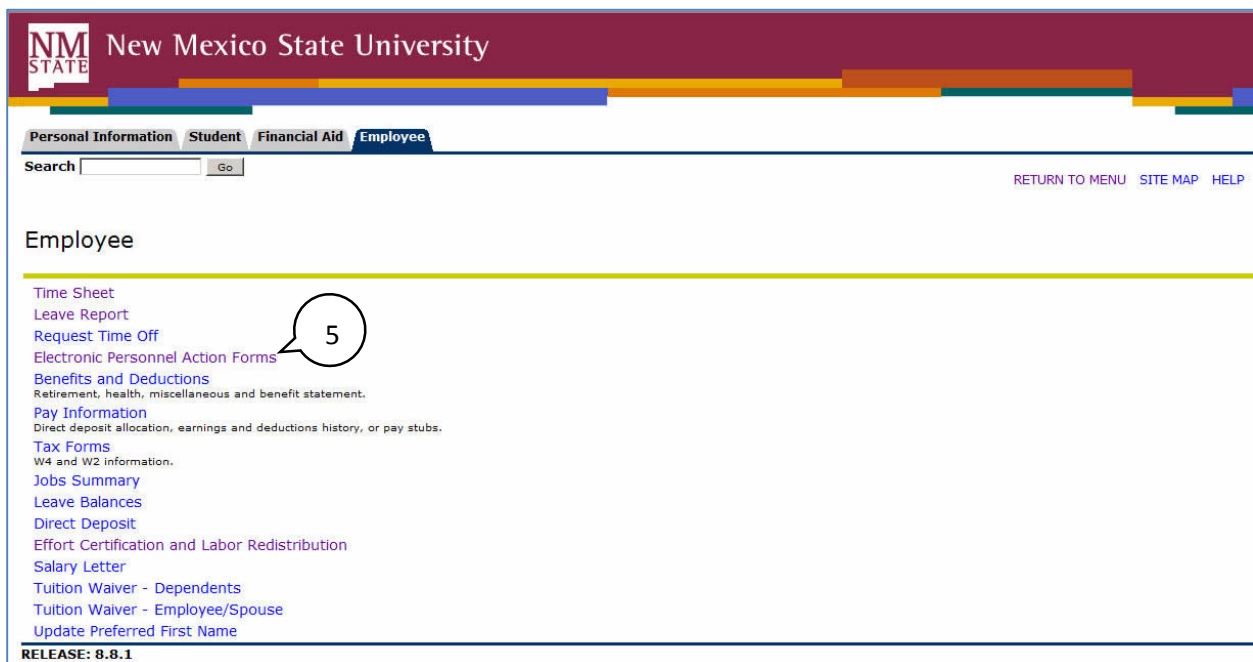


<https://my.nmsu.edu>

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**.

Approval 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 temporary employee hiring categories, describing each field that is available on the forms including a basic description of acceptable values and relevant examples.

Non-Exempt Staff, temp - Hire/Rehire with End Date, HNTHIR

This section describes the process of completing a **Non-Exempt Staff, temp - Hire/Rehire with End Date, HNTHIR** approval category to hire non-exempt temporary staff.

Creating a new HNTHIR

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

Type	Position	Suffix	Title	Time Sheet	Organization	Start Date	End Date	Last Paid Date	Status
Primary	199233	00	Univ Training Spec, Assc	530350	CENTER FOR LEARNING & PROF. DEV.	Oct 01, 2009		Nov 30, 2014	Active

2. Enter the Aggie **ID** of the employee that will be affected by the EPAF transaction.
 - You can do a search for the Aggie **ID** by clicking on the magnifying glass. Employees can be looked up using their first and last names, Aggie 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.

4. Select the **Approval Category** as appropriate. In this case we are creating a *Non-Exempt Staff, temp - Hire/Rehire with End Date, HNTHIR* EPAF.
5. Click **Go**.

How to determine the query date

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.

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 job. ***To ensure that the query date is earlier than the effective date, select the first day of the month for which the employee will be hired.***

For example, if an employee will begin work on 11/15/2014, set the query date to 11/01/2014.

Position Selection Screen

On the position selection screen, you determine the position number and suffix for the action.

The screenshot shows the 'Position Selection Screen' interface. At the top, 'Query Date:' is set to 'Nov 01, 2014' and 'Approval Category:' is 'Student-Hire/Rehire, HSHIR'. Below this is a section titled 'Activate Hire/Rehire NBA' with a 'JOBSS' button. A table lists job positions with columns: Search, Type, Position, Suffix, Title, Time Sheet Organization, Start Date, End Date, Last Paid Date, Status, and Select. The first row shows a search for 'New Job' with Position '999992' and Suffix '00', titled 'Student Aide' at '101000, SPECIAL ORG MAIN'. Below the table, a message states 'There are 1 jobs based on the Query Date.' with callout 2 pointing to the count. At the bottom are 'All Jobs' and 'Go' buttons, with callout 3 pointing to the 'Go' button.

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job	999992	00	Student Aide	101000, SPECIAL ORG MAIN					<input type="radio"/>

1. Select a position number

Before you begin the EPAF process you must first know the position number you will be affecting with the EPAF transaction.

Description	Position Number
Temporary Staff Non-Exempt Para-Professional	999998
Temporary Staff Non-Exempt Administrative	999999
PSL Temporary Staff Non-Exempt Para-Professional	968798
PSL Temporary Staff Non-Exempt Administrative	968799

2. Click All Jobs and select a position suffix

Specifying the correct position suffix is important because it helps to maintain a clear employment history for the employee records in Banner. The position suffix is a two digit alphanumeric code that uniquely identifies the position into which the employee will be hired.

First, you'll want to determine if you are re-hiring an employee for a position in your department or if you are hiring an employee for a position in your department for the first time by examining the job history. Click **All Jobs** to see the complete job history.

Has the employee ever been hired at NMSU using this position number according to their job history?

If No, enter suffix 00.

If Yes, is the employee being rehired using the exact same organization number?

- **If No**, increase the highest suffix number by 1.
- **If Yes**, do the payroll effective dates for the new job overlap with the payroll effective dates for the active/terminated job?
 - Yes: increase the highest suffix by one
 - No: Reuse the suffix of the most recently used position number

3. ***Click Go***

4. ***Click Save.***

Click save will populate the PEAEMPL section with information if a PEAEMPL record exists for this person. Also, clicking save will populate the NBAJOBS section with current information from Banner if the position that you are filling is a rehire in your department. This is important because you'll need this information to determine your next steps.

Remember to click Save before continuing to complete the EPAF form.

Employee PEAEMPL

Each employee has only one PEAEMPL record, even if they have more than one job. In order to maintain consistent information for employees that are being rehired or have more than one position, PEAEMPL should only be updated completely if this is the first job for this person at NMSU and it is only updated partially if the job will be the primary job for this person (i.e. they have no active jobs).

If you are filling a position as a secondary or overload job because the employee already has current active jobs, leave the entire PEAEMPL blank and you should continue on to the NBAJOBS section of the form.

The current information in this section populates PEAEMPL with information provided from Banner. If you can't see the current values for the PEAEMPL record you lack the necessary security to view the record details or no current PEAEMPL exists for this person.

Completing the PEAEMPL section for primary jobs

Employee PEAEMPL (For Primary Jobs Only), 999992-00 Student Employee		
Item	Current Value	New Value
Employee Status: (Not Enterable)	Active	<input type="text" value="A"/>
Employee Class Code:	SR, Student - Regular	<input type="text" value=""/>
Home Organization:	440530, STUDENT ENGAGEMENT	<input type="text" value=""/>
Distribution Orgn:	440530, STUDENT ENGAGEMENT	<input type="text" value=""/>
Current Hire Date: MM/DD/YYYY	08/24/2012	<input type="text" value=""/>
Home COAS: (Not Enterable)	N	<input type="text" value="N"/>
Distribution COA: (Not Enterable)	N	<input type="text" value="N"/>

1. Employee Class Code

The Employee Class is the most powerful rule from within Banner HR, and its attributes “trickle down” to many other areas of the system. The Employee Class is assigned to the Position Class (NTRPCLS), which is then assigned to the Position (NBAPOSN/NBAPBUD), which is then assigned to the Job (NBAJOBS). It establishes earnings codes, leave and benefit categories, FT/PT Status, Pay ID, time entry method, and Pay (salary/hourly) indicator.

Employee Class Reference

Code	Description
N3	Staff FT Temp – Non-Exempt
N4	Staff PT Temp – Non-Exempt
N8	PSL FT Temp – Non-Exempt
N9	PSL PT Temp – Non-Exempt

Enter the Employee Class Code as appropriate. You may also use the search feature to locate a value. If you are manually entering the value, be sure to use capital letters such as **S7** instead of **s7**.

2. Home Organization

The Home Organization is the organization number for the hiring department. You may use the search feature to locate the appropriate value for this field.

3. Distribution Organization

The Distribution Organization is the organization number for the hiring department. Technically, this field determines where paychecks will be sent if they are sent to a physical location. You may use the search feature to locate the appropriate value for this field. The Distribution Organization number must match the Home Organization number.

4. Current Hire Date

You only complete the Current Hire Date for the transaction if this is the first job for this person at NMSU. Otherwise, leave this field blank. The Current Hire date is the same as the personnel date for the position you are hiring. This will be the date that the employee reports to work.

If a PEAEMPL record exists for the employee, even if they don't have any active jobs and the PEAEMPL is inactive, the system will not allow you to enter or update the Current Hire Date field. If you attempt to update the Current Hire Date field in this situation, you will receive an error message.

Errors and Warning Messages

Type	Message Type	Description
Employee PEAEMPL & Activate Hire/Rehire NBAJOBS	VALIDATION	Current Hire Date must be left blank.

* - indicates a required field.

Employee PEAEMPL (For Primary Jobs Only)

Item	Current Value	New Value
Employee Status: (Not Enterable)	Terminated	<input type="text" value="A"/>
Employee Class Code:	E4. Staff PT Temp - Exempt	<input type="text" value="SR"/>
Home Organization:	51	<input type="text" value="510038"/>
Distribution Orgn:	510038, EMPLOYMENT & COMPENSATION SVCS	<input type="text" value="510038"/>
Current Hire Date: MM/DD/YYYY	07/01/2013	<input type="text" value="03/01/2015"/>
Home COAS: (Not Enterable)	N	<input type="text" value="N"/>
Distribution COA: (Not Enterable)	N	<input type="text" value="N"/>

Remove just this value.

Activate Hire/Rehire NBAJOBS, 999992-00 Student Aide

Item	Current Value	New Value
Job Status: *(Not Enterable)		<input type="text" value="A"/>
Contract Type: *		<input type="text" value="Primary"/>
Job Begin Date: MM/DD/YYYY (Not Enterable)		<input type="text" value="03/01/2015"/>

Remember: The PEAEMPL section should only be completed if the position will be the primary job for the employee. Leave the Current Hire Date blank, unless this is the first job for this person at NMSU. If secondary or overload job, leave All PEAEMPL fields blank.

Activate Hire/Rehire NBAJOBS

Item	Current Value	New Value
Job Status: *(Not Enterable)		A
Contract Type: *		Not selected
Job Begin Date: MM/DD/YYYY (Not Enterable)		
Jobs Effective Date: MM/DD/YYYY (Not Enterable)		
Personnel Date: MM/DD/YYYY*		
Title:		Not Selected
Employee Class Code: *		
Regular Rate: *		
FTE: *		
Hours per Day: (Not Enterable)		
Hours per Pay: (Not Enterable)		
Job Location: *		Not Selected
Timesheet Orgn: *		
Job Change Reason: *		HTEMP, Hire, Temporary Staff
Contract Number: (Not Enterable)		N/A

1. Contract Type

The contract type is used to specify if the position that is being filled is a primary, secondary, or overload job for the employee to be hired.

Primary – The primary job is the employee’s primary function and employing department. An employee can only have one primary job at a time and if they have more than one job, one must be designated as the primary. The primary job determines the type of benefits the employee is eligible for, how the employee is reported, how they are listed in the online phonebook, and where pay checks will be sent, etc.

Secondary – A job the employee will be working in addition to their primary job.

In order to determine the contract type you need to collect information about the employee’s job history.

If an employee currently has no active jobs you can specify Primary as the contract type. If an employee currently has an active job you may specify secondary.

If the EPAF is submitted as a primary contract type and the employee currently has a primary job, a validation error message will display indicating that the person already has a primary job. In this case choose secondary contract type and clear all values from the PEAEMPL section to pass the validation check.

Note: The Overload contract type is not applicable to this approval category.

2. Personnel Date

This is the date that the employee reports to work for this position. The value entered for the Personnel date will be used to determine the Job Begin Date and Job Effective Date. If the job is the primary job, the Personnel Date should match the current hire date in the **PEAMPL** section.

*Special Note: If you are **hiring for one day only**, the Personnel Date should be the date that the employee is starting the job (regardless if it is a weekday or weekend). In the Terminate NBAJOBS section below, you will enter a termination date as the next business day. The termination date cannot be the same as the job start date and it cannot be on a weekend.*

3. Title

The title appears as a drop-down list with all available titles for this employee classification.

4. Employee Class Code

The Employee Class code for the NBAJOBS record should match the Employee Class code for the PEAEMPL record if the job is the primary job for the employee.

Employee Class Reference

Code	Description
N3	Staff FT Temp – Non-Exempt
N4	Staff PT Temp – Non-Exempt
N8	PSL FT Temp – Non-Exempt
N9	PSL PT Temp – Non-Exempt

Enter the Employee Class Code as appropriate.

5. Regular Rate

The regular rate is the hourly rate of compensation for the employee. See the Non-Exempt and Exempt Salary tables for the proper compensation to use as the regular rate:

<http://hr.nmsu.edu/employment/salary/>

6. FTE

Full Time Equivalency (FTE) is a numeric indicator of workload for an employee. FTE must be greater than 0.00 but less than or equal to .74 for temp employees.

Example: FTE of 1 = 40 hours; FTE of .5 = 20 hours

7. Job Location

The job location is the organization number for the department that is hiring the employee. The Job Location field and Timesheet Orgn field must be different numbers.

The Job Location field is a dropdown menu that displays values in ascending order by job location number. You can quickly select the job location from the dropdown by selecting the job location menu and typing the job location number. Note that in order to move to the desired number using this method you must type the number rapidly on your keyboard.

The screenshot shows a section of the EPAF form with the following fields:

- Job Location: *
- Timesheet Orgn: *
- Job Change Reason: *
- Contract Number: (Not Enterable)

On the right side, there is a dropdown menu for Job Location. Callout 7 points to the dropdown arrow. Callout 8 points to the search icon next to the dropdown. The dropdown menu is open, showing the following options:

- Not Selected
- T15252
- HTEMP, Hire, Temporary Staff
- 248852

8. Timesheet Orgn

The timesheet orgn is the organization number for the supervisor/approver of the employee and is used as part of the Web Time entry process for employees that report hours worked. The Timesheet Orgn field and Job Location field must be the different numbers. The timesheet orgn must begin with the letter T.

Terminate NBAJOBS

The Terminate NBAJOBS section populates the NBAJOBS record with a job termination date. Some fields are automatically populated and are not enterable.

Terminate NBAJOBS, 999998-01 Temp Staff NE Para Prof	
Item	Current Value New Value
Job Status: (Not Enterable)	T
Jobs Effective Date: MM/DD/YYYY (Not Enterable)	1
Personnel Date: MM/DD/YYYY*	2
Job Change Reason: *(Not Enterable)	TERMJ

1. Jobs Effective Date (for Terminate NBAJOBS)

This value is automatically calculated based on the job change reason and Personnel termination date that you entered. Skip this field and complete the Personnel Date field and the value will populate automatically.

2. Personnel Date (for Terminate NBAJOBS)

The Personnel Date for the termination record is the last day of employment in this position. The Terminate NBAJOBS Personnel Date must be later than the Hire/Re-hire NBAJOBS Personnel Date and can be no longer than 1 year from hire date.

*Special Note: If you are **hiring for one day only**, the Personnel Date in the Activate Hire/Rehire NBAJOBS section above should be the date that the employee is starting the job (regardless if it is a weekday or weekend). In the Terminate NBAJOBS section, you will enter a termination date as the next business day. The termination date cannot be the same as the job start date and it cannot be on a weekend.*

Labor Distribution Section

The labor distribution section populates with information from Banner regarding the funding for this position. For rehires you may need to simply verify that the information is correct, however in other cases the index number or distribution percentages may need to be changed.

Labor Distribution, 999998-01 Temp Staff NE Para Prof											
Current											
Effective Date: 11/01/2013											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
Q	N	Q	107948	130005	101000	Q	616300	0020		100.00	
Q		Q				Q					
Q		Q				Q					
Q		Q				Q					
Q		Q				Q					
Total:										100.00	

Labor Distribution Effective Date

The effective date for the labor distribution is initially defaulted to the query date that you selected when the EPAF was created. When the NBAJOBS Hire/Re-hire section is completed the Labor Distribution Effective Date will automatically change to the job effective date.

If the query date for the EPAF is later than the desired labor distribution effective date an error will occur and you'll need to delete the current EPAF and start a new transaction.

If this error occurs you must delete or cancel the EPAF transaction and begin a new transaction. Remember to use the first day of the month for when the employee will report to work as the Query date. Not following this recommendation may result in errors such as the one displayed below.

Errors and Warning Messages		
Type	Message Type	Description
Labor Distribution	ERROR	New Job Labor Distribution Date should be >= query effective date.
* - indicates a required field.		

Index and Account Code

If you are rehiring the employee for a position within the same department the index number for the labor distribution will automatically populate with the previously used index number. If this is a new hire for your department a default index number will be automatically populated into the index number field. You cannot submit the transaction with the default index number for your department so an appropriate index to fund this position should be selected. In any event, you should always verify that the index number is the correct funding source for the position, whether the transaction is for a new hire or a rehire.

The account code used in the labor distribution section varies by position. Use the table below to select the appropriate account code for the transaction.

Description	Position Number	Account For Labor Distribution
Non-Exempt Para-Professional	999998	616300
Non-Exempt Administrative	999999	613300
PSL Non-Exempt Para-Professional	968798	616300
PSL Non-Exempt Administrative	968799	613300

Note: All indices used in the Labor Distribution section should use the same account code

Changing an Index

If you need to change the index number, follow these steps:

1. Enter the new index number in the index number field.
2. Click the **Default from index** button.
 - a. The page will reload and an error will indicate that an account code is required.
3. Key in the account code into the Account field.
4. Click **Save and add new row**.

Adding an Index

In some cases the position may be funded by more than one funding source. If you need to add another index number to the labor distribution, follow these steps:

1. Place a capital **N** in the COA column of the next blank row.
2. Enter the new index number in the index number field on the next row of the labor distribution list.
3. Click the **Default from index** button.
 - a. The page will reload and an error will indicate that an account code is required.
4. Enter the account code number as appropriate.
5. Click **Save and add new row**.

Changing the labor distribution percentage

If the position is funded by more than one index number you can change the percentage that each index will pay out for the position. If you need to change the labor distribution percentages for the position, follow these steps:

1. Enter the percent to be distributed in the **Percent** field for the first index.

Note: You must enter a whole number. For example, use 50 to indicate 50%, not .5
2. Enter the percent to be distributed in the **Percent** field for the second index.

Additional indexes may be added to the labor distribution and the percentage should be indicated for each index. **The total of all distributions must equal 100%.**
3. Click **Save and add new row**.


Remove an Index

In some cases you may need to remove an index number used to fund a position. You only need to remove indexes if more than one index was used in the past and the additional index is not needed. If you need to change the index, follow the procedure for changing an index as described on page 18.

If you need to remove an index from the labor distribution, follow these steps:

1. Click the **Remove** checkbox associated with the index row that you would like to remove.

Cost	Percent	Encumbrance Override End Date	Remove
	100.00		<input type="checkbox"/>



2. Click **Save and add new row**.

Routing Queue Section

The routing queue specifies the approval levels and approvers for the EPAF transaction. ***Note that the originator and approver cannot be the same person for this hiring action.***

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. See the *Default Routing Queue* section (pg. 56) for additional details.

Approval Level	User Name	Required Action	Remove
5 - (HR1) HR Services	<input type="text"/>	Approve	<input type="checkbox"/>
20 - (D/VP) Dean/VP	<input type="text"/>	Approve	<input type="checkbox"/>
99 - (PAY) Payroll	<input type="text"/>	Apply	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>
Not Selected	<input type="text"/>	Not Selected	<input type="checkbox"/>

Save and Add New Rows

The Temporary Hire EPAFs have three routing queue levels including:

HR Services – Performs initial review of the transaction

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 HR Services and 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 **HR Services** approval level choose your HR Business Partner from the list Business Partners:
 - c. For the **Dean/VP** level, choose the approver in your organization that is designated to approve your department's transactions.
 - d. For the **Payroll** approval level you may select any available approver on the search screen

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

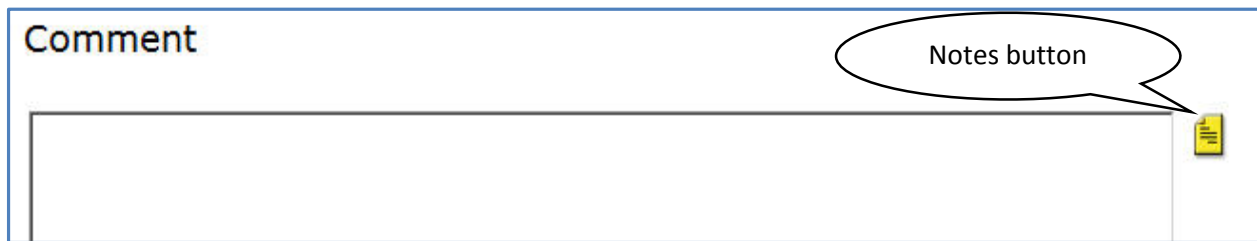
Comment

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 HR Services and Dean/VP approval levels. 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 or edited 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. 51) for additional information about viewing EPAF comments.

Note: Comments cannot be deleted or edited. Comments become part of the permanent record, disclosable, and should be appropriate to the action.

Save then Submit

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

Click **Save**
before **Submit**!

Save Submit

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.

Errors and Warning Messages

Type	Message Type	Description
Employee PEAEMPL & Activate Hire/Rehire NBAJOBS	VALIDATION	Home Organization and Job Location must match.
Employee PEAEMPL	VALIDATION	Home Organization and Distribution Orgn must match.

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.

Errors and Warning Messages

Type	Message Type	Description
Activate Hire/Rehire NBAJOBS	WARNING	*WARNING* Encumbrance Method is Value Input and salary has changed.

* - indicates a required field.

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

Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

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. For additional information about viewing saved and submitted EPAFs, see the section labeled *Originator Summary* (pg. 48).

Exempt Staff, temp - Hire/Rehire with End Date, HETHIR

This section describes the process of completing an **Exempt Staff, temp - Hire/Rehire with End Date, HETHIR** approval category to hire non-exempt temporary staff.

Creating a new HETHIR

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

2. Enter the Aggie **ID** of the employee that will be affected by the EPAF transaction.
 - You can do a search for the Aggie **ID** by clicking on the magnifying glass. Employees can be looked up using their first and last names, Aggie IDs and/or SSNs.
3. Enter the **Query Date** (defaults to today's date). The **Query Date** will be the first day of month of hire.
4. Select the **Approval Category** as appropriate. In this case we are creating an *Exempt Staff, temp - Hire/Rehire with End Date, HETHIR* EPAF.
5. Click **Go**.

How to determine the query date

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.

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 job. ***To ensure that the query date is earlier than the effective date, select the first day of the month for which the employee will be hired.***

For example, if an employee will begin work on 11/15/2014, set the query date to 11/01/2014.

Position Selection Screen

On the position selection screen, you determine the position number and suffix for the action.

The screenshot shows the 'Position Selection Screen' with the following details:

- Query Date:** Nov 01, 2014
- Approval Category:** Student-Hire/Rehire, HSHIR
- Activate Hire/Rehire NBA/** **JOBSS**
- Table:**

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job	999992	00	Student Aide	101000, SPECIAL ORG MAIN					<input checked="" type="radio"/>
- Message:** ⚠ There are no jobs based on the Query Date.
- Buttons:** All Jobs, Go

Callouts indicate: 1 points to the Position field (999992), 2 points to the 'All Jobs' button, and 3 points to the 'Go' button.

1. Select a position number

Before you begin the EPAF process you must first know the position number you will be affecting with the EPAF transaction.

Description	Position Number
Temporary Staff Exempt	999997
PSL Temporary Staff Exempt	968899

2. Click All Jobs and select a position suffix

Specifying the correct position suffix is important because it helps to maintain a clear employment history for the employee records in Banner. The position suffix is a two digit alpha-numeric code that uniquely identifies the position into which the employee will be hired.

First, you'll want to determine if you are re-hiring an employee for a position in your department or if you are hiring an employee for a position in your department for the first time by examining the job history. Click **All Jobs** to see the complete job history.

Has the employee ever been hired at NMSU using this position number according to their job history?

If No, enter suffix 00.

If Yes, is the employee being rehired using the exact same organization number?

- **If No**, increase the highest suffix number by 1.
- **If Yes**, do the payroll effective dates for the new job overlap with the payroll effective dates for the active/terminated job?
 - Yes: increase the highest suffix by one
 - No: Reuse the suffix of the most recently used position number

3. **Click Go**

4. **Click Save.**

Click save will populate the PEAEMPL section with information if a PEAEMPL record exists for this person. Also, clicking save will populate the NBAJOBS section with current information from Banner if the position that you are filling is a rehire in your department. This is important because you'll need this information to determine your next steps.

New Mexico State University

Personal Information | Student | Financial Aid | **Employee**

Search [RETURN TO EMPLOYEE MENU](#) [SITE MAP](#) [HELP](#)

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit. OBJECTNAME:bwkpeaf.P_NewPersEpafDet1

Name and ID: Pracilla A. Brendelen, 800XXXXXX

Transaction: Query Date: May 1, 2013

Transaction Status:

Approval Category: - Hire/Rehire, HSHIR

[Approval Types](#) | [Account Distribution](#) | [Routing Queue](#) | [Transaction History](#)

* - indicates a required field.

Remember to click Save before continuing to complete the EPAF form.

Employee PEAEMPL

Each employee has only one PEAEMPL record, even if they have more than one job. In order to maintain consistent information for employees that are being rehired or have more than one position, PEAEMPL should only be updated completely if this is the first job for this person at NMSU and it is only updated partially if the job will be the primary job for this person (i.e. they have no active jobs).

If you are filling a position as a secondary or overload job because the employee already has current active jobs, leave the entire PEAEMPL blank and you should continue on to the NBAJOBS section of the form.

The current information in this section populates PEAEMPL with information provided from Banner. If you can't see the current values for the PEAEMPL record you lack the necessary security to view the record details or no current PEAEMPL exists for this person.

Completing the PEAEMPL section for primary jobs

Employee PEAEMPL (For Primary Jobs Only), 999992-00 Student Employee		
Item	Current Value	New Value
Employee Status: (Not Enterable)	Active	<input type="text" value="A"/>
Employee Class Code:	SR, Student - Regular	<input type="text" value=""/>
Home Organization:	440530, STUDENT ENGAGEMENT	<input type="text" value=""/>
Distribution Orgn:	440530, STUDENT ENGAGEMENT	<input type="text" value=""/>
Current Hire Date: MM/DD/YYYY	08/24/2012	<input type="text" value=""/>
Home COAS: (Not Enterable)	N	<input type="text" value="N"/>
Distribution COA: (Not Enterable)	N	<input type="text" value="N"/>

1. Employee Class Code

The Employee Class is the most powerful rule from within Banner HR, and its attributes “trickle down” to many other areas of the system. The Employee Class is assigned to the Position Class (NTRPCLS), which is then assigned to the Position (NBAPOSN/NBAPBUD), which is then assigned to the Job (NBAJOBS). It establishes earnings codes, leave and benefit categories, FT/PT Status, Pay ID, time entry method, and Pay (salary/hourly) indicator.

Employee Class Reference

Code	Description
E3	Staff FT Temp - Exempt
E4	Staff PT Temp - Exempt
E8	PSL FT Temp - Exempt
E9	PSL PT Temp - Exempt

Enter the Employee Class Code as appropriate. You may also use the search feature to locate a value. If you are manually entering the value, be sure to use capital letters such as **S7** instead of **s7**.

2. Home Organization

The Home Organization is the organization number for the hiring department. You may use the search feature to locate the appropriate value for this field.

3. Distribution Organization

The Distribution Organization is the organization number for the hiring department. Technically, this field determines where paychecks will be sent if they are sent to a physical location. You may use the search feature to locate the appropriate value for this field. The Distribution Organization number must match the Home Organization number.

4. Current Hire Date

You only complete the Current Hire Date for the transaction if this is the first job for this person at NMSU. Otherwise, leave this field blank. The Current Hire date is the same as the personnel date for the position you are hiring. This will be the date that the employee reports to work.

If a PEAEMPL record exists for the employee, even if they don't have any active jobs and the PEAEMPL is inactive, the system will not allow you to enter or update the Current Hire Date field. If you attempt to update the Current Hire Date field in this situation, you will receive an error message.

Errors and Warning Messages

Type	Message Type	Description
Employee PEAEMPL & Activate Hire/Rehire NBAJOBS	VALIDATION	Current Hire Date must be left blank.

* - indicates a required field.

Employee PEAEMPL (For Primary Jobs Only)

Item	Current Value	New Value
Employee Status: (Not Enterable)	Terminated	<input type="text" value="A"/>
Employee Class Code:	E4. Staff PT Temp - Exempt	<input type="text" value="SR"/>
Home Organization:	51	<input type="text" value="510038"/>
Distribution Orgn:	510038, EMPLOYMENT & COMPENSATION SVCS	<input type="text" value="510038"/>
Current Hire Date: MM/DD/YYYY	07/01/2013	<input type="text" value="03/01/2015"/>
Home COAS: (Not Enterable)	N	<input type="text" value="N"/>
Distribution COA: (Not Enterable)	N	<input type="text" value="N"/>

Remove just this value.

Activate Hire/Rehire NBAJOBS, 999992-00 Student Aide

Item	Current Value	New Value
Job Status: *(Not Enterable)		<input type="text" value="A"/>
Contract Type: *		<input type="text" value="Primary"/>
Job Begin Date: MM/DD/YYYY (Not Enterable)		<input type="text" value="03/01/2015"/>

Remember: The PEAEMPL section should only be completed if the position will be the primary job for the employee. Leave the Current Hire Date blank, unless this is the first job for this person at NMSU. If secondary or overload job, leave All PEAEMPL fields blank.

Activate Hire/Rehire NBAJOBS

Item	Current Value	New Value
Job Status: *(Not Enterable)		A
Contract Type: *		Not selected
Job Begin Date: MM/DD/YYYY (Not Enterable)		
Jobs Effective Date: MM/DD/YYYY (Not Enterable)		
Personnel Date: MM/DD/YYYY*		
Title:		Not Selected
Employee Class Code: *		
Regular Rate: *		
FTE: *		
Hours per Day: (Not Enterable)		
Hours per Pay: (Not Enterable)		
Job Location: *		Not Selected
Timesheet Orgn: *		
Job Change Reason: *		HTEMP, Hire, Temporary Staff
Contract Number: (Not Enterable)		N/A

1. Contract Type

The contract type is used to specify if the position that is being filled is a primary or secondary job for the employee to be hired.

Primary – The primary job is the employee’s primary function and employing department. An employee can only have one primary job at a time and if they have more than one job, one must be designated as the primary. The primary job determines the type of benefits the employee is eligible for, how the employee is reported, how they are listed in the online phonebook, and where pay checks will be sent, etc.

Secondary – A job the employee will be working in addition to their primary job.

In order to determine the contract type you need to collect information about the employee’s job history.

If an employee currently has no active jobs you can specify Primary as the contract type. If an employee currently has an active job you may specify Secondary.

If the EPAF is submitted as a primary contract type and the employee currently has a primary job, a validation error message will display indicating that the person already has a primary job. In this case choose secondary contract type and clear all values from the PEAEMPL section to pass the validation check.

2. Personnel Date

This is the date that the employee reports to work for this position. The value entered for the Personnel date will be used to determine the Job Begin Date and Job Effective Date.

*Special Note: If you are **hiring for one day only**, the Personnel Date should be the date that the employee is starting the job (regardless if it is a weekday or weekend). In the Terminate NBAJOBS section below, you will enter a termination date as the next business day. The termination date cannot be the same as the job start date and it cannot be on a weekend.*

3. Title

The title appears as a drop-down list with all available titles for this employee classification.

4. Employee Class Code

The Employee Class code for the NBAJOBS record should match the Employee Class code for the PEAEMPL record if the job is the primary job for the employee.

Employee Class Reference

Code	Description
E3	Staff FT Temp - Exempt
E4	Staff PT Temp - Exempt
E8	PSL FT Temp - Exempt
E9	PSL PT Temp - Exempt

Enter the Employee Class Code as appropriate. You may also use the search feature to locate a value.

5. Regular Rate

The regular rate is the **hourly** rate of compensation for the employee. See the Non-Exempt and Exempt Salary tables for the proper compensation to use as the regular rate:

<http://hr.nmsu.edu/employment/salary/>

6. FTE

Full Time Equivalency (FTE) is a numeric indicator of workload for an employee. FTE must be greater than 0.00 but less than or equal to .74 for temp employees.

Example: FTE of 1 = 40 hours; FTE of .5 = 20 hours

7. Job Location

The job location is the organization number for the department that is hiring the employee. The Job Location field and Timesheet Orgn field must be different numbers.

The Job Location field is a dropdown menu that displays values in ascending order by job location number. You can quickly select the job location from the dropdown by selecting the job location menu and typing the job location number. Note that in order to move to the desired number using this method you must type the number rapidly on your keyboard.

Job Location: *	Not Selected
Timesheet Orgn: *	T15252
Job Change Reason: *	HTEMP, Hire, Temporary Staff
Contract Number: (Not Enterable)	248852

8. Timesheet Orgn

The timesheet orgn is the organization number for the supervisor/approver of the employee and is used as part of the Web Time entry process for employees that report hours worked. The Timesheet Orgn field and Job Location field must be different numbers. The timesheet orgn must begin with the letter T.

Terminate NBAJOBS

The Terminate NBAJOBS section populates the NBAJOBS record with a job termination date. Some fields are automatically populated and are not enterable.

Terminate NBAJOBS, 999998-01 Temp Staff NE Para Prof		
Item	Current Value	New Value
Job Status: (Not Enterable)		T
Jobs Effective Date: MM/DD/YYYY (Not Enterable)		
Personnel Date: MM/DD/YYYY*		
Job Change Reason: *(Not Enterable)		TERMJ

1. Jobs Effective Date (for Terminate NBAJOBS)

This value is automatically calculated based on the job change reason and Personnel termination date that you entered. Skip this field and complete the Personnel Date field and the value will populate automatically.

2. Personnel Date (for Terminate NBAJOBS)

The Personnel Date for the termination record is the last day of employment in this position. The Terminate NBAJOBS Personnel Date must be later than the Hire/Re-hire NBAJOBS Personnel Date and can be no longer than 1 year from hire date.

*Special Note: If you are **hiring for one day only**, the Personnel Date in the Activate Hire/Rehire NBAJOBS section above should be the date that the employee is starting the job (regardless if it is a weekday or weekend). In the Terminate NBAJOBS section, you will enter a termination date as the next business day. The termination date cannot be the same as the job start date and it cannot be on a weekend.*

Labor Distribution Section

The labor distribution section populates with information from Banner regarding the funding for this position. For rehires you may need to simply verify that the information is correct, however in other cases the index number or distribution percentages may need to be changed.

Labor Distribution, 999997-00 Temp Staff Exempt

Current
Effective Date: 11/01/2013
COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New
Effective Date: MM/DD/YYYY (Not Enterable) 11/23/2013

COA	Index	Fund	Organization Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date	Remove
Q N	Q 100864	110006	500500	Q 614100	1401	P00000			100.00				<input type="checkbox"/>
Q	Q			Q									
Q	Q			Q									
Q	Q			Q									
Q	Q			Q									
Total:									100.00				

Default from Index Save and Add New Rows

Labor Distribution Effective Date

The effective date for the labor distribution is initially defaulted to the query date that you selected when the EPAF was created. When the NBAJOBS Hire/Re-hire section is completed the Labor Distribution Effective Date will automatically change to the job effective date.

If the query date for the EPAF is later than the desired labor distribution effective date an error will occur and you'll need to delete the current EPAF and start a new transaction.

If this error occurs you must delete or cancel the EPAF transaction and begin a new transaction. Remember to use the first day of the month for when the employee will report to work as the Query date. Not following this recommendation may result in errors such as the one displayed below.

Errors and Warning Messages		
Type	Message Type	Description
Labor Distribution	ERROR	New Job Labor Distribution Date should be >= query effective date.
* - indicates a required field.		

Index and Account Code

If you are rehiring the employee for a position within the same department the index number for the labor distribution will automatically populate with the previously used index number. If this is a new hire for your department a default index number will be automatically populated into the index number field. You cannot submit the transaction with the default index number for your department so an appropriate index to fund this position should be selected. In any event, you should always verify that the index number is the correct funding source for the position, whether the transaction is for a new hire or a rehire.

The account code used in the labor distribution section varies by position. Use the table below to select the appropriate account code for the transaction.

Description	Position Number	Account For Labor Distribution
Temporary Staff Exempt	999997	614300
PSL Temporary Staff Exempt	968899	614300

Note: All indices used in the Labor Distribution section should use the same account code

Changing an Index

If you need to change the index number, follow these steps:

1. Enter the new index number in the index number field.
2. Click the **Default from index** button.
 - a. The page will reload and an error will indicate that an account code is required.
3. Key in the account code into the Account field.
4. Click **Save and add new row**.

Adding an Index

In some cases the position may be funded by more than one funding source. If you need to add another index number to the labor distribution, follow these steps:

1. Place a capital **N** in the COA column of the next blank row.
2. Enter the new index number in the index number field on the next row of the labor distribution list.
3. Click the **Default from index** button.
 - a. The page will reload and an error will indicate that an account code is required.
4. Enter the account code number as appropriate.
5. Click **Save and add new row**.

Changing the labor distribution percentage

If the position is funded by more than one index number you can change the percentage that each index will pay out for the position. If you need to change the labor distribution percentages for the position, follow these steps:

1. Enter the percent to be distributed in the **Percent** field for the first index.
Note: You must enter a whole number. For example, use 50 to indicate 50%, not .5
2. Enter the percent to be distributed in the **Percent** field for the second index.
Additional indexes may be added to the labor distribution and the percentage should be indicated for each index. **The total of all distributions must equal 100%.**
3. Click **Save and add new row**.


Remove an Index

In some cases you may need to remove an index number used to fund a position. You only need to remove indexes if more than one index was used in the past and the additional index is not needed. If you need to change the index, follow the procedure for changing an index as described on page 18.

If you need to remove an index from the labor distribution, follow these steps:

1. Click the **Remove** checkbox associated with the index row that you would like to remove.

Cost	Percent	Encumbrance Override End Date	Remove
	100.00		<input type="checkbox"/>



2. Click **Save and add new row**.

Routing Queue Section

The routing queue specifies the approval levels and approvers for the EPAF transaction. **Note that the originator and approver cannot be the same person for this hiring action.**

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. See the *Default Routing Queue* section (pg. 56) for additional details.

Routing Queue			
Approval Level	User Name		Required Action Remove
5 - (HR1) HR Services	<input type="text"/>		Approve
20 - (D/VP) Dean/VP	<input type="text"/>		Approve
99 - (PAY) Payroll	<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
Save and Add New Rows			

The Temporary Hire EPAFs have three routing queue levels including:

HR Services – Performs initial review of the transaction

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 HR Services and 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 **HR Services** approval level choose your HR Business Partner from the list Business Partners:
<http://hr.nmsu.edu/contacts/>
 - c. For the **Dean/VP** level choose the approver in your organization that is designated to approve your department's transactions.
 - d. For the **Payroll** approval level you may select any available approver on the search screen
2. Click **Save and Add New Rows** button to save your changes and populate the name of the approver.

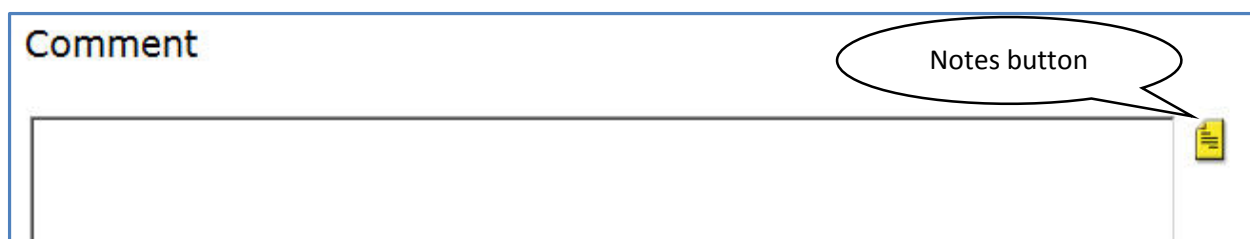
Comment

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 HR Services and Dean/VP approval levels. 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 or edited 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* for additional information about viewing EPAF comments.

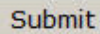
Note: Comments cannot be deleted or edited. Comments become part of the permanent record, they are disclosable, and should be appropriate to the action.

Save then Submit

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



Click **Save**
before **Submit**!



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.

Errors and Warning Messages

Type	Message Type	Description
Employee PEAEMPL & Activate Hire/Rehire NBAJOBS	VALIDATION	Home Organization and Job Location must match.
Employee PEAEMPL	VALIDATION	Home Organization and Distribution Orgn must match.

Ignore errors 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.



Errors and Warning Messages

Type	Message Type	Description
Activate Hire/Rehire NBAJOBS	WARNING	*WARNING* Encumbrance Method is Value Input and salary has changed.

* - indicates a required field.

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

Electronic Personnel Action Form

 The transaction has been successfully submitted. Enter the information for the EPAF and either Save or Submit

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. For additional information about viewing saved and submitted EPAFs, see the section labeled *Originator Summary* (pg. 48).

Supplemental Comp Hire with End Date, HESHIR

This section describes the process of completing a **Supplemental Comp Hire with End Date, HESHIR** approval category to hire employees that already have an exempt staff position.

Important

Before you begin the hiring action for supplemental compensation, please note the additional compensation guidelines on the HR Web site:

<http://hr.nmsu.edu/employment/salary/>

Supplemental Hires

Policy (refer to NMSU Policy Manual section 4.70)

Supplemental compensation may be paid to faculty and staff acting in the capacity of a professional/faculty employee for an additional assignment performed during normal university working hours, providing that assignment is (1) clearly outside the scope of that person's regular teaching, research and service responsibilities; and (2) does not interfere with those responsibilities. Such time will be counted against a faculty member's allowed consulting time and must be approved in advance by all cognizant administrators, including the executive vice president and provost. This compensation may be authorized in addition to regular salary for those employees exempt from overtime provisions of the Fair Labor Standards Act and is used to authorize payment for consulting, workshops, etc. Supplemental compensation will not be paid solely on the basis that the salary has been budgeted into the agreement.

Supplemental Pay Calculations & Examples

Faculty Teaching Additional Courses: To calculate supplemental pay for faculty teaching additional courses, use the formula below.

1. 9 month salary of employee divided by 24 credits per academic year = salary per credit hour
2. Salary per credit hour multiplied by number of credit hours being taught = requested base salary (RBS)

Example:

Dr. Doe will be teaching Mgt 502.72 (3 credit hours). His 9 month salary is \$88,954.04.

$\$88,954.04 / 24 \text{ credits} = \$3,706.42 \text{ per credit hour}$

$\$3,706.42 * 3 \text{ credits} = \$11,119.26 \text{ RBS}$

Regular Full-time Staff teaching a class: To calculate supplemental pay for regular full-time staff teaching a class, use the formula below.

1. (Annual salary divided by 24 pay periods per year) multiplied by 18 = equivalent 9 month salary
2. Equivalent 9 month salary divided by 24 credit hours per academic year = salary per credit hour
3. Salary per credit hour multiplied by number of credit hours being taught = requested base salary (RBS)

Example:

Ms. Hancock will be teaching 3 credit hours. Her regular salary is \$62,000.

$\$62,000.00 / 24 \text{ pay periods} = \$2,583.33 * 18 = \$46,499.94$

$\$46,499.94 / 24 \text{ credit hours} = \$1,937.50$

$\$1,937.50 * 3 = \$5,812.50 \text{ RBS}$

Additional information needed:

1. Dates of employment will be the actual semester dates (either fall or spring dates)
2. FTE will be .25 (3/12)
 - a. Credits taught divided by 12 credits per semester
 - i. 1 credit = $1/12 = .08$
 - ii. 2 credits = $2/12 = .17$
 - iii. 3 credits = $3/12 = .25$
 - iv. 4 credits = $4/12 = .33$

Regular staff receiving supplemental compensation for additional duties: Regular staff are paid a stipend when providing services (other than teaching) outside the scope of their current job responsibilities. To calculate supplemental pay for regular staff, use the formula below.

1. Calculate the number of days to be worked per pay period
2. Divide by the number of available work days in the pay period = % of week worked
3. (Total amount of stipend divided by % of week worked) x 24 pay periods = annualized RBS
 - a. Number of hours to be worked x hourly rate of pay = total amount of stipend

Example:

Mr. John worked a total of 30 hours at a rate of \$20/hour. His total stipend will be \$600 ($30 \times 20 = 600$). He worked August 23, 2008 through October 25, 2008 on the project.

Aug 16 – Aug 30, 2008 = 5 out of 10 days worked = .50

Sept 1 – Oct 15, 2008 = 3 full pay periods = 3.0

Oct 16 – Oct 31, 2008 = 7 out of 12 days worked = .5833

$.50 + 3.0 + .5833 = 4.0833$ pay periods

$\$600 \text{ stipend amount} / 4.0833 \text{ pay periods} = \$146.93 \times 24 = \$3,536.32$ annualized RBS

Additional information needed:

1. Pay has to be equal to or less than current rate of pay
- Research done by faculty:** Sponsored projects are governed by Circular A-21, Revised 05/10/04, which does not allow for exceptions. To calculate supplemental pay for faculty doing research, use the formula below.

1. Current academic salary divided by 36 weeks = pay per week
2. Pay per week multiplied by # of weeks to be worked = total amount of one (1) FTE
 - a. Number of weeks to be worked = # of days to be worked x 0.2
 - i. 8 hours/40 hours per week = $0.2 = 1 \text{ day}$
3. Multiplied by FTE = Total amount to be paid
 - a. FTE = # of hours to be worked per week divided by 40 available hours per week
 - b. FTE cannot exceed 50%
4. Calculate the number of days to be worked per pay period

5. Divide by the number of available work days in the pay period = % of week worked
6. Add together the % of week worked for each pay period to equal the Total Pay Period Proration
7. (Total amount to be paid (from #3 above) divided by total pay period proration) multiplied by 24 pay periods = annualized RBS

Example:

Dr. Smith will do research 12 hours/week from May 14, 2008 to June 30, 2008. Her academic salary is \$50,000.

$$34 \text{ weekdays} \times .2 = 6.80 \text{ weeks}$$

$$\text{FTE} = 12/40 = .30$$

Pay Period Proration Calculation

- Pay period 1 = $2/11 = .1818$
- Pay period 2 = $11/11 = 1.0$
- Pay period 3 = $10/10 = 1.0$
- Pay period 4 = $11/11 = 1.0$
- Total pay period proration = $.1818 + 1.0 + 1.0 + 1.0 = 3.1818$

$$\$50,000/36 = \$1,388.89 \text{ per week}$$

$$\$1,388.89 \times 6.8 \text{ weeks} = \$9,444.45$$

$$\$9,444.45 \times .30 \text{ FTE} = \$2,833.34 \text{ amount to be paid}$$

$$\$2,833.34/3.1818 \text{ pay period proration} = \$890.48 \times 24 \text{ pay periods} = \$21,371.52 \text{ annualized RBS}$$

Supplemental Pay Calculation for fixed rates: Some grants specify a fixed rate to be paid over the length of the contract. If this is the case, the calculations must ensure that the rate to be paid does not exceed the employee's current rate of pay. To calculate the RBS for fixed rate contracts, use the following formula.

1. Requested Base Salary Calculation
 - a. Current academic salary divided by 36 weeks = pay per week
 - b. Pay Period Proration
 - i. Calculate the number of days to be worked per pay period
 - ii. Divide by the number of available work days in the pay period = % of week worked

- iii. Add together the % of week worked for each pay period to equal the Total Pay Period Proration
- c. Total amount to be paid (from the contract) divided by total pay period proration = bi-weekly pay rate (this cannot exceed the amount in step 1)
- d. Multiply results of step 1c by 24 pay periods = annualized RBS
- 2. FTE Calculation
 - a. Number of weeks to be worked = # of days to be worked x 0.2
 - i. 8 hours/40 hours per week = 0.2 = 1 day
 - b. Current pay per week (step 1a) multiplied by number of weeks to be worked (step 2a) = total amount at 1 FTE
 - c. Fixed amount to be paid divided by total amount at 1 FTE (step 2b) = FTE (round up to 2 decimals)

Example:

Dr. Jeckle will be paid \$5,800 over the summer (May 12 – Aug 15) to perform research in the lab. His current salary is \$50,000.00.

- 1. $\$50,000/36 = 1,388.89$ pay per week

Pay Period Proration Calculation

- Pay period 1 = $3/10 = .3$
- Pay period 2 = $11/11 = 1.0$
- Pay period 3 = $11/11 = 1.0$
- Pay period 4 = $11/11 = 1.0$
- Pay period 5 = $11/11 = 1.0$
- Pay period 6 = $11/11 = 1.0$
- Pay period 7 = $11/11 = 1.0$
- Total pay period proration = $.3 + 1.0 + 1.0 + 1.0 + 1.0 + 1.0 + 1.0 = 6.3$

$\$5,800/6.3 = 920.63$ = bi-weekly rate

920.63×24 pay periods = 22,095.12 Annualized RBS (amount to be entered in e-hire)

- 2. $68 \text{ days} \times .2 = 13.60$ weeks
 $13.6 \times \$1,388.89 = 18,888.89$ (amount for 1 FTE)
 $\$5800/18,888.89 = .309$ (round to 0.31) = FTE (enter .31 in FTE field in e-hire)

Creating a new HESHIR

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

2. Enter the Aggie **ID** of the employee that will be affected by the EPAF transaction.
 - You can do a search for the Aggie **ID** by clicking on the magnifying glass. Employees can be looked up using their first and last names, AggieIDs and/or SSNs.
3. Enter the **Query Date** (defaults to today's date). The query date will be the first day of the month of hire.
4. Select the **Approval Category** as appropriate. In this case we are creating a *Supplemental Comp Hire with End Date, HESHIR* EPAF.
5. Click **Go**.

How to determine the query date

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.

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 job. ***To ensure that the query date is earlier than the effective date, select the first day of the month for which the employee will be hired.***

For example, if an employee will begin work on 1/10/2013, set the query date to 1/1/2013.

Position Selection Screen

New EPAF Job Selection

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

ID: Sally Ann Rel, 800036301
Query Date: Apr 01, 2014
Approval Category: Supp w/end date, HESHIR

Activate Hire/Rehire NBA/BSH

Search Type	Position	Suffix	Title	Time Sheet	Organization	Start Date	End Date	Last Paid Date	Status	Select
New Job	918898	00	Temp Staff Supplemental Pay	101000,	SPECIAL ORG MAIN					<input checked="" type="radio"/>
Primary	199233	00	Univ Training Spec, Assc	530350,	CENTER FOR LEARNING & PROF. DEV.	Oct 01, 2009		Feb 28, 2014	Active	<input type="radio"/>

All Jobs **Go**

1. Click All Jobs

You should examine the employment history for the person to be hired in order to determine the appropriate position suffix.

Always click the **All Jobs** button before continuing to enter the position information.

2. Select a position number and suffix

Position Number

Before you begin the EPAF process you must first know the position number you will be affecting with the EPAF transaction. Choose a position number based on the employee description you intend to hire.

Description	Position Number
Temporary Staff Supplemental Compensation	918898

Position Suffix

Specifying the correct position suffix is important because it helps to maintain a clear employment history for the employee records in Banner. The position suffix is a two digit alpha-numeric code that uniquely identifies the position into which the employee will be hired.

First, you'll want to determine if you are re-hiring an employee for a position in your department or if you are hiring an employee for a position in your department for the first time.

New hire

Examine the list of past jobs and determine if the employee has ever been hired using this position number.

- i. If this employee has been ***hired for the same position in another department***, increase the previous position suffix by one. For example, if the other department's position number is 05 increase the suffix to 06.
- ii. If the employee has ***never been hired for this position*** (by any department) use the suffix 00.

Re-hire

1. Examine the list of past jobs and determine the most recently terminated position in your department that uses the same position number.
2. Re-use the position suffix for this most recently terminated position.

3. Click Go.

The EPAF detail screen will display.

4. Click Save.

Clicking save will populate the NBAJOBS section with current information from Banner if the position that you are filling is a rehire in your department.

The screenshot shows a form with the following fields: Transaction: (empty), Transaction Status: (empty), Approval Category: Supplemental Comp Hire with End Date, HESHIR. A 'Save' button is located at the bottom left. A callout bubble with the number '4' points to the 'Save' button. The 'Query Date: Nov 01, 2013' is displayed in the top right corner.

Transaction:	Query Date: Nov 01, 2013
Transaction Status:	
Approval Category: Supplemental Comp Hire with End Date, HESHIR	
Save	

Activate Hire/Rehire NBAJOBS**Activate Hire/Rehire NBAJOBS, 918898-00 Temp Staff Supplemental Pay**

Item	Current Value	New Value
Job Status: *(Not Enterable)		A
Contract Type: *(Not Enterable)		O 1
Job Begin Date: MM/DD/YYYY (Not Enterable)		
Jobs Effective Date: MM/DD/YYYY (Not Enterable)		
Personnel Date: MM/DD/YYYY*		
Title:		Not Selected 2
Employee Class Code: *		3 4
Annual Salary: *		5
FTE: *		6
Hours per Day: (Not Enterable)		
Hours per Pay: (Not Enterable)		
Pays: (Not Enterable)		24
Factor: (Not Enterable)		24
Job Location: *		Not Selected 7
Timesheet Orgn: *		8
Job Change Reason: *(Not Enterable)		HTEMP
Contract Number: (Not Enterable)		N/A

1. Contract Type

The contract type is used to specify if the position that is being filled is a primary, secondary, or overload job for the employee to be hired.

Employees hired using the Supplemental Comp approval category **are all Overload contract types**.

2. Personnel Date

This is the date that the employee reports to work for this position. The value entered for the Personnel date will be used to determine the Job Begin Date and Job Effective Date.

3. Title

The title appears as a drop-down list with all available titles for this employee classification.

4. Employee Class Code

Enter the Employee Class Code as appropriate.

Employee Class Reference

Code	Description
E3	Staff FT Temp - Exempt
E4	Staff PT Temp - Exempt
E8	PSL FT Temp - Exempt
E9	PSL PT Temp - Exempt

5. Annual Salary

The annual salary is the compensation for the employee determined by the base salary that the employee will receive for this job. See the Non-Exempt and Exempt Salary tables for the proper compensation to use as the annual salary. Typically, the salary should not exceed the rate of salary for the employee's regular exempt position.

<http://hr.nmsu.edu/employment/salary/>

Calculators are also available that may assist you in calculating the Requested Base Salary (RBS) for the employee based on the desired amount to be paid.

Reference the Temporary Staff Employment Hiring Toolkit the calculator:

<http://hr.nmsu.edu/toolkits/>

6. FTE

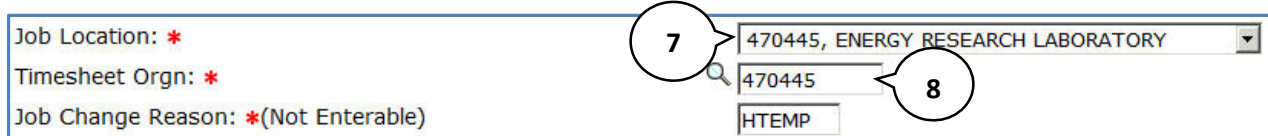
Full Time Equivalency (FTE) is a numeric indicator of workload for an employee. FTE must be greater than 0.00 but less than or equal to 1.50. In normal hiring situations the FTE should not exceed .5 for this employment type.

Example: FTE of 1 = 40 hours; FTE of .5 = 20 hours

7. Job Location

The job location is the organization number for the department that is hiring the employee. The Job Location field and Timesheet Orgn field must be different numbers.

The Job Location field is a dropdown menu that displays values in ascending order by job location number. You can quickly select the job location from the dropdown by selecting the job location menu and typing the job location number. Note that in order to move to the desired number using this method you must type the number rapidly on your keyboard.



Job Location: *

Timesheet Orgn: *

Job Change Reason: *(Not Enterable)

470445, ENERGY RESEARCH LABORATORY

470445

HTEMP

8. Timesheet Orgn

The timesheet orgn is the organization number for the department that is hiring the employee. The Timesheet Orgn field and Job Location must be identical. The timesheet orgn should not begin with the letter T.

Terminate NBAJOBS

The Terminate NBAJOBS section populates the NBAJOBS record with a job termination date. Some fields are automatically populated and are not enterable.

Terminate NBAJOBS, 918898-00 Temp Staff Supplemental Pay	
Item	Current Value New Value
Job Status: (Not Enterable)	<input type="text" value="T"/>
Jobs Effective Date: MM/DD/YYYY (Not Enterable)	1 <input type="text"/>
Personnel Date: MM/DD/YYYY*	2 <input type="text"/>
Job Change Reason: *(Not Enterable)	<input type="text" value="TERMJ"/>

1. Jobs Effective Date (for Terminate NBAJOBS)

This value is automatically calculated based on the job change reason and Personnel termination date that you entered. Skip this field and complete the Personnel Date field and the value will populate automatically.

2. Personnel Date (for Terminate NBAJOBS)

The Personnel Date for the termination record is the last day of employment in this position. The Terminate NBAJOBS Personnel Date must be later than the Hire/Re-hire NBAJOBS Personnel Date.

Labor Distribution Section

The labor distribution section populates with information from Banner regarding the funding for this position. For rehires you may need to simply verify that the information is correct, however in other cases the index number or distribution percentages may need to be changed.

Labor Distribution, 918898-00 Temp Staff Supplemental Pay											
Current											
Effective Date: 04/01/2014											
COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date
N	107948	130005	101000	619300	0020					100.00	
									Total:	100.00	

✓

Labor Distribution Effective Date

The effective date for the labor distribution is initially defaulted to the query date that you selected when the EPAF was created. When the NBAJOBS Hire/Re-hire section is completed the Labor Distribution Effective Date will automatically change to the job effective date.

If the query date for the EPAF is later than the desired labor distribution effective date an error will occur and you'll need to delete the current EPAF and start a new transaction.

If this error occurs you must delete or cancel the EPAF transaction and begin a new transaction. Remember to use the first day of the month for when the employee will report to work as the Query date. Not following this recommendation may result in errors such as the one displayed below.

Errors and Warning Messages		
Type	Message Type	Description
Labor Distribution	ERROR	New Job Labor Distribution Date should be >= query effective date.
* - indicates a required field.		

Index and Account Code

If you are rehiring the employee for a position within the same department the index number for the labor distribution will automatically populate with the previously used index number. If this is a new hire for your department a default index number will be automatically populated into the index number field. You cannot submit the transaction with the default index number for your department so an appropriate index to fund this position should be selected. In any event, you should always verify that the index number is the correct funding source for the position, whether the transaction is for a new hire or a rehire.

The account code used in the labor distribution section varies by position. Use the table below to select the appropriate account code for the transaction.

Description	Position Number	Account For Labor Distribution
Temporary Staff Supplemental Compensation	918898	619300

Note: All indices used in the Labor Distribution section should use the same account code

Changing an Index

If you need to change the index number, follow these steps:

1. Enter the new index number in the index number field.
2. Click the **Default from index** button.
 - a. The page will reload and an error will indicate that an account code is required.
3. Key in the account code into the Account field.
4. Click **Save and add new row**.

Adding an Index

In some cases the position may be funded by more than one funding source. If you need to add another index number to the labor distribution, follow these steps:

1. Place a capital **N** in the COA column of the next blank row.
2. Enter the new index number in the index number field on the next row of the labor distribution list.
3. Click the **Default from index** button.
 - a. The page will reload and an error will indicate that an account code is required
4. Enter the account code number as appropriate.
5. Click **Save and add new row**.

Changing the labor distribution percentage

If the position is funded by more than one index number you can change the percentage that each index will pay out for the position. If you need to change the labor distribution percentages for the position, follow these steps:

1. Enter the percent to be distributed in the **Percent** field for the first index.

Note: You must enter a whole number. For example, use 50 to indicate 50%, not .5
2. Enter the percent to be distributed in the **Percent** field for the second index.

Additional indexes may be added to the labor distribution and the percentage should be indicated for each index. **The total of all distributions must equal 100%.**
3. Click **Save and add new row**.


Remove an Index

In some cases you may need to remove an index number used to fund a position. You only need to remove indexes if more than one index was used in the past and the additional index is not needed. If you need to change the index, follow the procedure for changing an index as described on page 18.

If you need to remove an index from the labor distribution, follow these steps:

1. Click the **Remove** checkbox associated with the index row that you would like to remove.

Cost	Percent	Encumbrance Override End Date	Remove
	100.00		<input type="checkbox"/>



2. Click **Save and add new row**.

Default Earnings Section

The Default Earnings Section is automatically defaulted with the correct values. Skip this section and proceed to the Routing Queue Section.

Routing Queue Section

The routing queue specifies the approval levels and approvers for the EPAF transaction. **Note that the originator and approver cannot be the same person for this hiring action.**

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. See the *Default Routing Queue* section (pg. 56) for additional details.

Approval Level	User Name	Required Action	Remove
5 - (HR1) HR Services	<input type="text"/>	Approve	<input type="button" value="Remove"/>
20 - (D/VP) Dean/VP	<input type="text"/>	Approve	<input type="button" value="Remove"/>
99 - (PAY) Payroll	<input type="text"/>	Apply	<input type="button" value="Remove"/>
Not Selected	<input type="text"/>	Not Selected	<input type="button" value="Remove"/>
Not Selected	<input type="text"/>	Not Selected	<input type="button" value="Remove"/>
Not Selected	<input type="text"/>	Not Selected	<input type="button" value="Remove"/>
Not Selected	<input type="text"/>	Not Selected	<input type="button" value="Remove"/>

Save and Add New Rows

The Temporary Hire EPAFs have three routing queue levels including:

HR Services – Performs initial review of the transaction

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 HR Services and 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 **HR Services** approval level choose your HR Business Partner from the list Business Partners:
<http://hr.nmsu.edu/contacts/>
 - c. For the **Dean/VP** level choose the approver in your organization that is designated to approve your department's transactions.
 - d. For the **Payroll** approval level you may select any available approver on the search screen

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

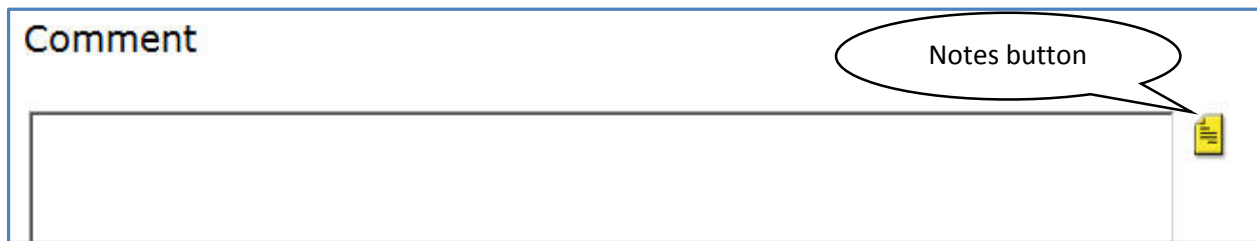
Comment

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 HR Services and Dean/VP approval levels. 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.

The image shows a screenshot of the EPAF interface. At the top, there is a label 'Comment' in a blue box. Below it is a large, empty text input field. To the right of the input field, there is a small yellow icon of a notepad with a pencil, which is circled by a speech bubble labeled 'Notes button'.

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. 25) 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.

Click **Save**
before **Submit**!

Save Submit

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.

Errors and Warning Messages

Type	Message Type	Description
Employee PEAEMPL & Activate Hire/Rehire NBAJOBS	VALIDATION	Home Organization and Job Location must match.
Employee PEAEMPL	VALIDATION	Home Organization and Distribution Orgn must match.

Ignore validation 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.

Errors and Warning Messages

Type	Message Type	Description
Activate Hire/Rehire NBAJOBS	WARNING	*WARNING* Encumbrance Method is Value Input and salary has changed.

* - indicates a required field.

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

Electronic Personnel Action Form

✓ The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit









Upon successful submission the EPAF will be routed to the Dean/VP level approver. The EPAF will now be on your EPAF Originator Summary screen under the History tab. For additional information about viewing saved and submitted EPAFs, see the section labeled *Originator Summary* (pg. 48).

Originator Summary

The originator summary displays EPAF transaction information for EPAFs that have been submitted for approval or saved. The list only includes transactions that you have submitted. Transactions by other departments or other originators in your department will not display in this list.

Sorting the transaction list

You can sort the EPAF transaction list by column heading. Click the arrows in the column to be sorted in order to sort the transactions.

<i>EPAF Transactions</i>			
 Name 	 ID 	 Transaction 	 Type of Change 

1. Click the up arrow to sort the column in ascending order.
2. Click the down arrow to sort the column in descending order.

Note: You can only sort by one column at a time; you cannot sort using multiple columns simultaneously.

Viewing comments and warnings

You can view the comments and warnings recorded for an EPAF by selecting the link **Comments** or **Warnings** from the list of EPAF transactions.

This option will display all comments that were created by either the originator or approver.

Search Transactions

You can search for transactions if you know the first name, last name, or ID of the person that is affected by the transaction. You can also search by transaction number and limit the number of results displayed per page.

Note: You will only be able to see EPAFs that you have originated or EPAFs that have been routed to you for approval.

To search for transactions:

1. From the EPAF menu, click either **EPAF Approver Summary** or **EPAF Originator Summary**.
2. Click **Search**

The EPAF search screen displays.

Transaction Search

Enter the Last Name and or First Name of the person or an ID. Or, enter a Transaction number. wildcard.

Search Criteria

Last Name:

First Name:

Or

ID:

Or

Transaction Number:

Transactions per Page: 25

3. Search using information about the person being affected by the EPAF by typing their name or ID in the fields as indicated. You may also search using the EPAF transaction number if the transaction number is known.
4. Click **Go**
An EPAF search results screen will display showing all transactions that match your search criteria.
5. You can view the transaction detail for a transaction by clicking on the employee name.

Current tab

The current tab displays EPAF transactions that are saved or returned for correction.

Transaction status

Status	Description
Waiting	This status indicates that the transaction is in the process of being created and has not been submitted to the approval queue.
Pending	Indicates that the transaction requires positive action by the approver(s). The transaction remains at this status until action is taken by the person required to take action on the transaction.
Return for Correction	This status indicates that an EPAF has been returned for correction by the originator or the approver.
Approved	The transaction status is approved for the person when all the person(s) defined in the approval queue have approved the transaction. The transaction remains at this status until the person defined in the queue with apply privileges applies the transaction to the database.
Complete	The transaction status becomes Complete after the transaction has been applied to the database.
Disapproved	The transaction has been disapproved by a person defined in the approval queue. The individuals defined after them in the approval queue can no longer need to take action on the item.
Void	The originator or superuser has voided the transaction. It is no longer a valid transaction. The originator or superuser may void the transaction at any time during the approval process. The originator or superuser are the only people that can void the original transaction.
Canceled	This status will be used when you opt to cancel an entire transaction after it has been applied to the database. Cancelling a transaction after it has been applied will have no effect on the transaction in Banner.

Edit a saved EPAF

After the EPAF is saved it becomes available on the current tab of the EPAF originator summary. To edit a saved EPAF:

1. From the EPAF menu, click **EPAF Originator Summary**
The Current tab displays
2. Locate the transaction in the list
If you have several EPAFs you can sort, filter, or search for the transaction that you want to find.
3. Click on the **name** of the employee or **transaction ID** for the EPAF you want to edit.
The EPAF detail screen will open in preview mode (read only)
4. Click **Update** to edit the EPAF transaction.

Delete the EPAF

EPAFs that have been saved and have not been submitted for approval can be deleted. Once an EPAF is deleted it is permanently removed and it will not appear on the originator summary screen.

To delete an EPAF:

1. From the EPAF menu, click **EPAF Originator Summary**
The Current tab displays
2. Locate the transaction in the list
If you have several EPAFs you can sort, filter, or search for the transaction that you want to find.
3. Click on the **name** of the employee or **transaction ID** for the EPAF you want to delete.
The EPAF detail screen will open in preview mode (read only)
4. Click **Delete** to delete the EPAF transaction permanently.

Note: You cannot delete an EPAF if it has been submitted for approval. Only saved EPAFs can be deleted. In order to otherwise make a submitted EPAF inactive you should void the EPAF, which may require that you return the transaction for correction to yourself. For additional information about returning EPAFs for correction and voiding transactions, please see the History tab section below.

History tab

The history tab displays EPAF transactions that have been submitted for approval. In addition, EPAFs that have been voided will also appear under the history tab.

Return the EPAF for correction

An originator can return an EPAF for correction after it has been submitted for approval in order to make updates or to void the transaction. Once the EPAF has been returned for correction it will move to the Current tab of the originator summary screen.

Note: You can only act on EPAFs that you have originated.

To return an EPAF for correction:

1. From the EPAF menu, click **EPAF Originator Summary**
The Current tab displays
2. Click the **History** tab
3. Locate the transaction in the list
If you have several EPAFs you can sort or search for the transaction that you want to find.
4. Click on the **name** of the employee for the EPAF you want to return for correction.
The EPAF detail screen will open in preview mode (read only)
5. Click **Return for Correction** to move the EPAF back to your current tab.

Void the EPAF

EPAFs that have been saved or have been submitted for approval can be voided by the originator. Once an EPAF has been voided it will remain on the EPAF originator summary screen under the History tab.

1. From the EPAF menu, click **EPAF Originator Summary**
The Current tab displays
2. Locate the transaction in the list
If you have several EPAFs you can sort or search for the transaction that you want to find.
3. Click on the **name** of the employee for the EPAF you want to void.
The EPAF detail screen will open in preview mode (read only)
4. Click **Void** to remove the EPAF from approval queues and move the transaction to the history tab.

Default Routing Queue

Default routing queues can be set-up by approval category.

Mandatory levels are set-up automatically but you can manually populate the Dean/VP approval user and the Payroll approval user.

Default routing queues are available for each EPAF approval category. If you use more than one EPAF approval category you need to set the defaults for each category used.

Set the default routing queue

The screenshot shows the 'EPAF Default Routing Queue' form. At the top, a yellow banner contains the text: 'Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.' Below this, the 'Approval Category' dropdown is set to 'Not Selected' (callout 3), and the 'Go' button is highlighted (callout 4). The main table, titled 'Approval Queue', has columns for 'Approval Level', 'User', and 'Required Action'. The first column has a dropdown menu (callout 5) and a magnifying glass icon. The table contains four rows, all with 'Not Selected' in the first and third columns. At the bottom left, the 'Save and Add New Rows' button is highlighted (callout 6).

1. From the EPAF Menu, click **EPAF Originator Summary**
2. Click **Default Routing Queue**
3. From the **Approval Category** drop-down list, select the approval category for which the routing queue defaults will be set.
4. Click **Go**.

Different approval categories may have different approval levels and required actions which will be pre-populated into the approval level field and required action field respectively. For each approval level you will select a user that will be the default value every time you use the approval category. Note: Approvers at various levels can be changed on a case-by-case basis as you are submitting the EPAF, even if a default exists.

5. Use the magnifying glass icon to select the user to populate in the approval level field.
6. Click **Save and Add New Rows**.
Repeat the process for each approval category where you would like to set default values.

EPAF Approvals

Approval processing begins when an EPAF is submitted. The transaction will appear under the approvers EPAF Approver Summary in Self Service Banner (SSB). Approvers act to validate and approve all EPAF transactions based on the approval queue that is required for the personal action that is being originated. The approval queue is specified by the originator when the EPAF is created during the origination process.

Banner EPAF does not generate email notifications when EPAF transactions are pending. Approvers must check their approval queue periodically.

EPAF Approver Summary

EPAF Approver Summary

Current In My Queue History

Select the link under Name to access details of the transaction.

✓ Filtering On

Queue Status: All Pending Go

[New EPAF](#) | [Update Proxies](#)

Select All Reset Save

Viewing pending approvals

1. From the EPAF menu, click **EPAF Approver Summary**
The Current tab displays with a list of transactions awaiting your approval.
2. Locate the transaction in the list that you want to evaluate
If you have several EPAFs you can sort, filter, or search for the transaction that you want to find.
3. Click on the **name** of the employee or **transaction ID** for the EPAF you want to evaluate.
The EPAF detail screen will open in preview mode (read only)

Important checks for approvers

Listed below are some important manual checks that you'll need to perform for each EPAF transaction.

Labor Distribution Section

Index number

Confirm that the correct index number is being used to fund the position.

Account

Confirm that the correct account is being used for this type of expenditure.

Comments

Comments are added to the EPAF transaction by the Originator when the EPAF is created. Originators use the comments section to include additional information about the transaction not otherwise recorded in the available form fields. Examine the comments to determine if sufficient information is provided in order to approve the transaction.

Return an EPAF for correction

If the EPAF transaction lacks required details or contains errors you can return the EPAF for correction to the originator of the EPAF.

To return the EPAF for correction:

1. From EPAF approver preview screen, click **Add Comment**.
2. Add comments to the transaction with sufficient information that would enable the originator to identify and correct the error or omission in the EPAF transaction.
3. Click **Save** to save the comments.
4. Click **Return for Correction** to return the EPAF to the Originator.

Approving an EPAF transaction

If the EPAF transaction contains all required details and no errors are found you can approve the transaction in order to move the transaction to the Apply transaction status.

To approve the EPAF transaction, from EPAF approver preview screen, click **Approve**.

Filter Transactions

Filters apply to both the current and history tabs. Filters allow you to view only those records that meet your filter parameters directly through your Originator or Approver Summary screens. You can filter transactions by date and choose the number of records to display per page.

The screenshot shows a web form titled "Proxy or Superuser or Filter Transactions". Below the title is a yellow bar with a speech bubble icon and the text: "Act as a proxy or a superuser and enter the following criteria to filter transactions." The form contains the following fields and controls:

- Proxy For:** A dropdown menu with "Self" selected.
- Act as a Superuser:** An unchecked checkbox.
- Submitted From Date: MM/DD/YYYY**: A text input field with a callout bubble labeled "2" pointing to it.
- Submitted To Date: MM/DD/YYYY**: A text input field with a callout bubble labeled "3" pointing to it.
- Transactions Per Page:** A dropdown menu with "25" selected and a callout bubble labeled "4" pointing to it.
- Go**: A button with a callout bubble labeled "5" pointing to it.

To add a filter:

1. From the EPAF Menu, click **Act as a Proxy**.
2. Set the **submitted from date** as appropriate to limit returned results in your summary screen that are greater than the date entered.
3. Set the **submitted to date** as appropriate to limit returned results in your summary screen that are less than the date entered.
4. Set the number of results to display per page by selecting an option from the **transactions per page** drop-down list.
5. Click **Go**

Once a filter is applied it will remain until you remove the filter.

To remove a filter:

1. From the EPAF Menu, click **Act as Proxy**.
2. Clear all date fields in the filter screen.
3. Click **Go**

Proxy Set-up

EPAF approvers can allow proxy access to their approver summary for other users in the system. Note that in order to assign proxy access to another user the intended proxy must already have access to the EPAF system.

To add a proxy:

1. From the EPAF Menu, click **EPAF Proxy Records**.

The screenshot shows the top navigation bar with tabs for 'Personal Information', 'Student', 'Financial Aid', and 'Employee'. Below the tabs is a search bar with a 'Go' button. The main content area is titled 'Electronic Personnel Action Form'. A list of links is displayed: 'EPAF Approver Summary', 'EPAF Originator Summary', 'New EPAF', 'EPAF Proxy Records' (highlighted with a dashed border and a callout bubble labeled '1'), and 'Act as a Proxy'. At the bottom, it says 'RELEASE: 8.5'.

2. As appropriate, choose the **Approval Level** from the approval level dropdown list.
3. Select the name of the intended proxy from the **Name** dropdown list.
Note: You can quickly select the name from the list by selecting the dropdown and typing the last name of the proxy.

The screenshot shows the 'EPAF Proxy Records' form. It has the same navigation bar as the previous screenshot. The form contains an 'Approval Level' dropdown menu (callout '2') with 'Dean/VP, D/VP' selected. Below it is a 'Name' dropdown menu (callout '3') with 'Not Selected' displayed. To the right of the 'Name' dropdown is a 'Remove Add' button (callout '4') with an unchecked checkbox. At the bottom left is a 'Save' button (callout '5').

4. Click the **Add** checkbox.
5. Click **Save**.

The screenshot shows the 'EPAF Proxy Records' form. It includes an 'Approval Level' dropdown menu (callout 2) currently set to 'Dean/VP, D/VP'. Below this is a table with a header row containing 'Name', 'Remove', and 'Add'. The first row of the table has a name field (callout 3) and a 'Remove' checkbox which is checked. Below the table is a 'Not Selected' dropdown menu and a 'Save' button (callout 4).

To remove a proxy:

1. From the EPAF Menu, click **EPAF Proxy Records**.
2. As appropriate, choose the **Approval Level** from the approval level dropdown list.
3. Click the **Remove** checkbox next to the name of the user whose access should be removed.
4. Click **Save**.

Act as a Proxy

If you have been assigned proxy access by another user you can view the approver summary for that user and act on their behalf.

The screenshot shows the 'Proxy or Superuser or Filter Transactions' form. It includes a header with a yellow bar and a blue icon followed by the text 'Act as a proxy or a superuser and enter the following criteria to filter transactions.' Below this are several fields: 'Proxy For:' with a dropdown menu set to 'Self' (callout 2), 'Act as a Superuser:' with an unchecked checkbox, 'Submitted From Date: MM/DD/YYYY' with a text input field, 'Submitted To Date: MM/DD/YYYY' with a text input field, and 'Transactions Per Page:' with a dropdown menu set to '25'. At the bottom left is a 'Go' button (callout 3).

To act as a proxy:

1. From the EPAF Menu, click **Act as a Proxy**.
2. From the **Proxy For** dropdown list, choose the user from the list of users.
3. Click **Go**.

Note: Your Proxy access will be enabled for the entire session. Any actions taken by you when acting as Proxy will be recorded under your name, not the name of the proxy. Proxy access simply allows you to

view information available under another user's approver summary. Proxy access does not grant additional security.

Glossary of common terms

Approval Category	Refers to the name of the EPAF and its purpose. It must contain one approval type at the least.
Approval Level	Refers to a step in the approval hierarchy through which the transaction must go through before applying changes to the database.
Approval Type	Refers to the type of actions requested on the EPAF form. Every approval type shows on the form as a separate section. Examples of such types are the Job Details Information and the Job Labor Distribution types or sections.
Approver	Any user designated as part of the approval hierarchy to approve or reject an EPAF.
Effective Date	The payroll effective date of the action. This date cannot be before the last paid date. If the real action date is prior to this date, you must enter the next day.
Originator	The user initiating and submitting the EPAF transaction.
Personnel Date	The date the action is effective; the true effective date.
Query Date	The first date of the month when the employee will report to work.
Queue Status	Refers to the status of the transaction with regard to an individual defined in the routing queue.
Transaction	Refers to the whole approval process from the moment it was initiated by the originator to the moment when changes are applied to the database.
Transaction Status	Refers to the status of the EPAF transaction as a whole.