Electronic Personnel Action Forms (EPAF)

Terminating Student Employees

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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 Employee Self-services (ESS) which is accessible through myNMSU. Access to EPAF is not granted to all NMSU employees; it is only for those employees who have been designated in the system as EPAF originators and/or approvers.

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

EPAF key features

Default values

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

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

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

Lookup fields

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

Field validation (error checking)

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

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

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

How to access EPAFs

What you should know before you begin the EPAF process

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

- 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/

Some job aids and tools will also help:

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/

Work-study Resources – Provides information about Federal, State and Crimson Scholar Work-study Programs at NMSU.

Work-study Handbook: http://fa.nmsu.edu/work-study/handbook/

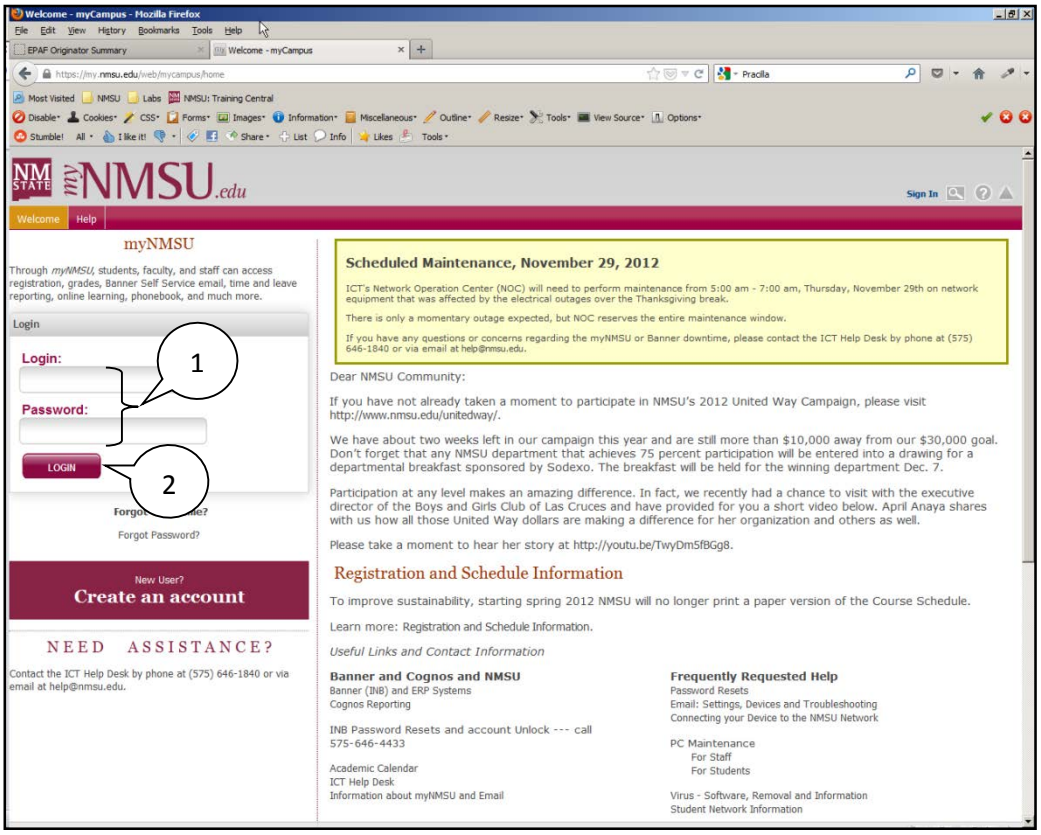
Work-study Employer Responsibilities: http://fa.nmsu.edu/work-study/employers/

Access EPAF through my.nmsu.edu using your browser

Please Note:

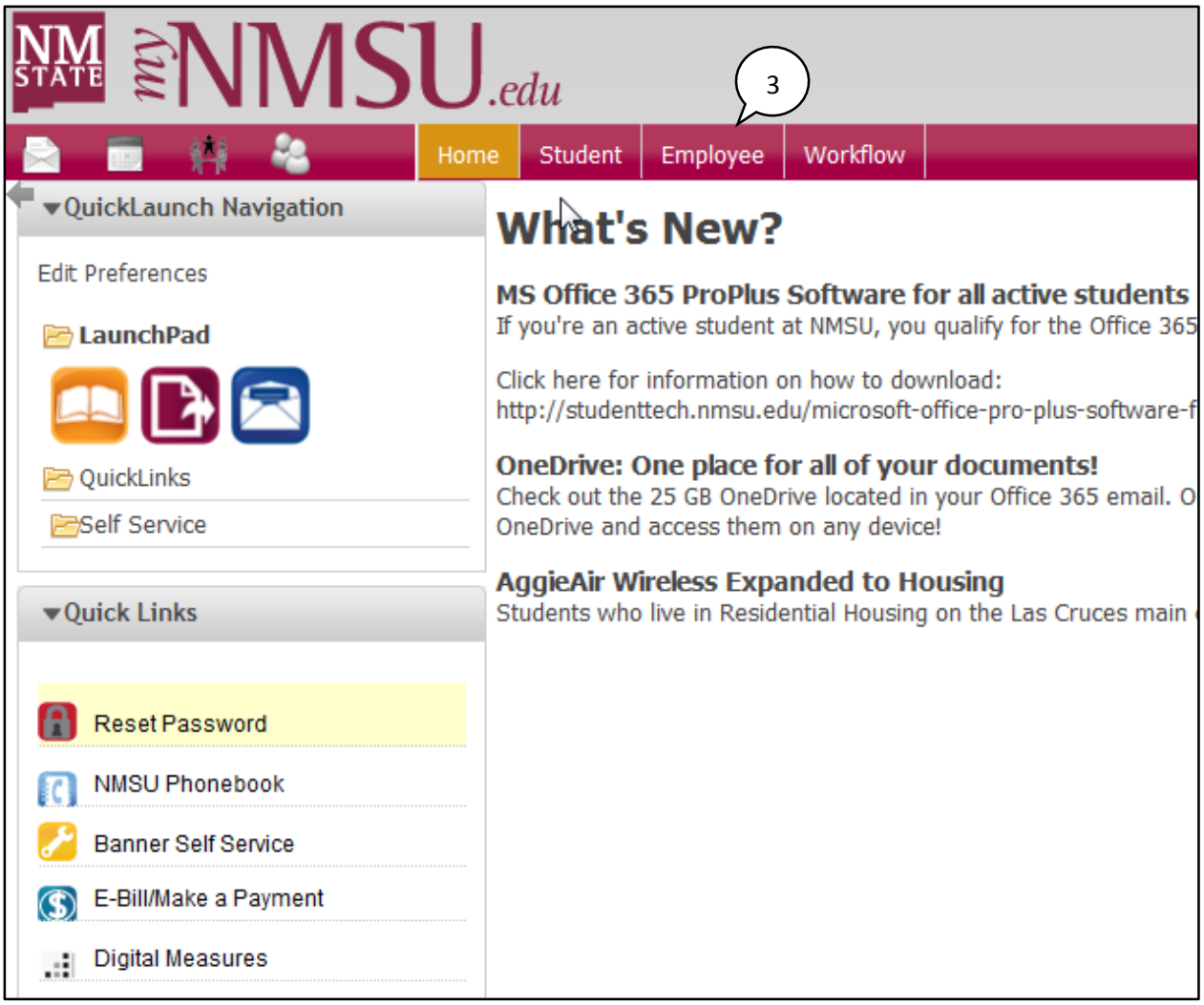
Internet Explorer is not support. We recommend alternate browsers such as the latest versions of Mozilla Firefox, Google Chrome, or Apple Safari.

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.

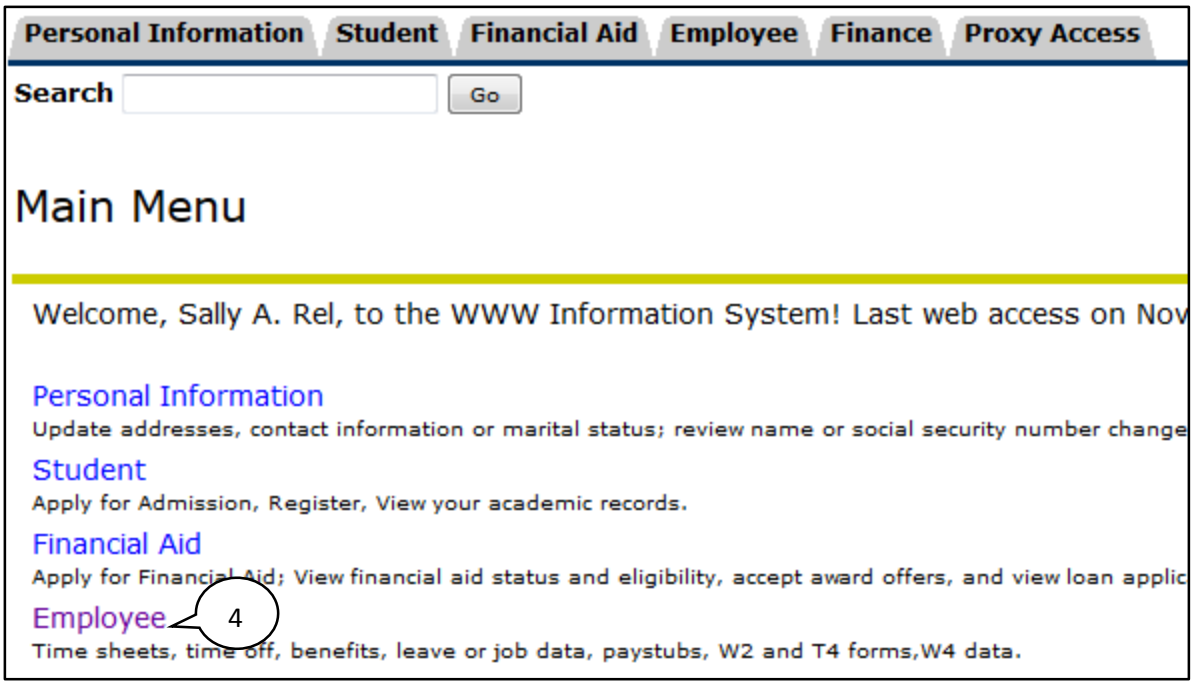


https://my.nmsu.edu

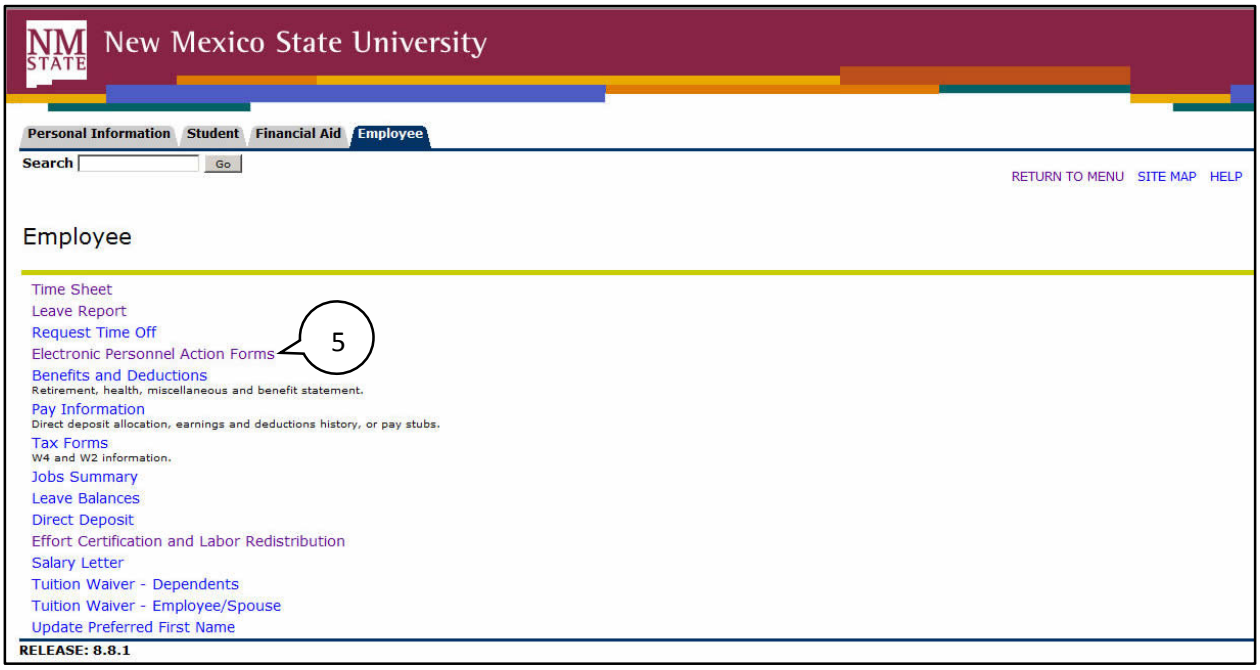
1. Enter your NMSU **User Name** and **Password**.
2. Click on the **Login** button.



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**.

EPAF Categories

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

Student – Job Termination/TSTRM

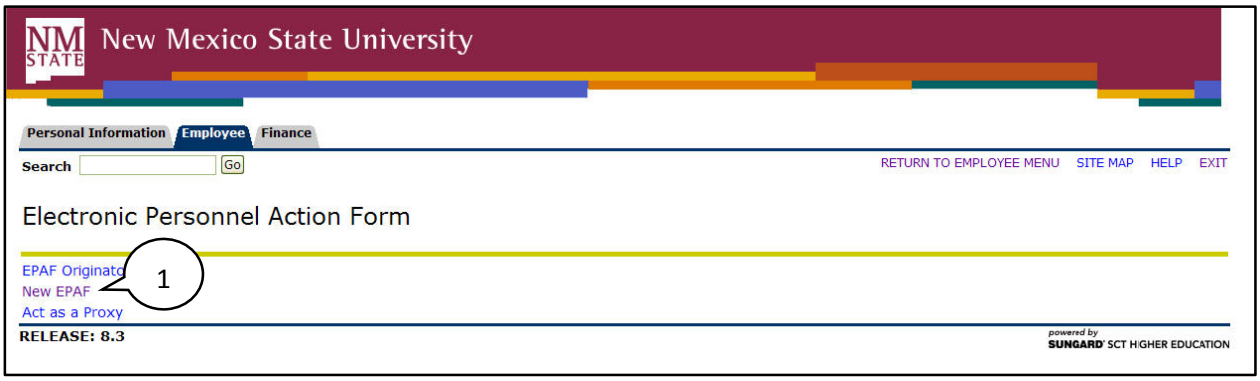
This section describes the process of completing a **Student – Job Termination/TSTRM** approval category to terminate a Regular and Work-study students.

The Student – Job Termination/TSTRM EPAF has a single purpose, it is used to terminate student jobs in the Banner system. As such, there is only one form and section to complete, the NBAJOBS form job termination information.

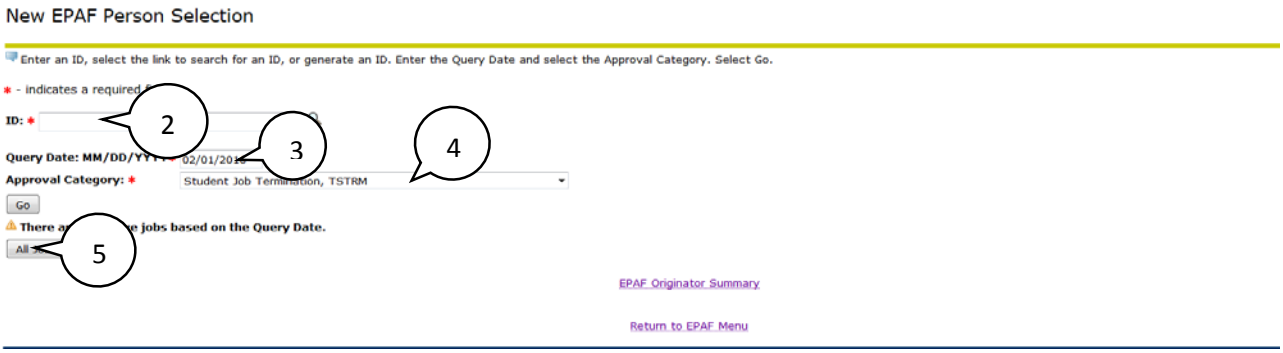
Before you begin, please note that any future dated job record or pending action (such as termination actions, changes to pay, title, or other job changes that have already been submitted) cannot be overridden by this process. If a future dated job action exists you will receive an error when attempting to submit the action and you will be prompted to contact Human Resources Information Systems (HRIS). In consultation with HRIS you should request to remove the future dated job actions. Once the future dated job actions are removed you may continue the Student – Job Termination/TSTRM EPAF process.

*Note: If you are terminating a student job as an **involuntary termination** you must first contact Employee and Labor Relations (ELR) to discuss the termination process. After consultation with ELR you may initiate the Student – Job Termination/TSTRM EPAF action.*

Creating a new TSTRM EPAF



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



2. Enter the Banner **ID** of the employee that will be affected by the EPAF transaction.
    - You can do a search for the Banner **ID** by clicking on the magnifying glass. Employees can be looked up using their first and last names, Banner IDs and/or SSNs***.***
3. Enter the **Query Date** (defaults to today's date). See the section labeled "How to determine the query date" for additional details about how to select the appropriate query date for the transaction.
4. Select the **Approval Category** as appropriate. In this case we are creating a *Student – Job Termination, TSTRM*
5. Click **Go**.

How to determine the query date

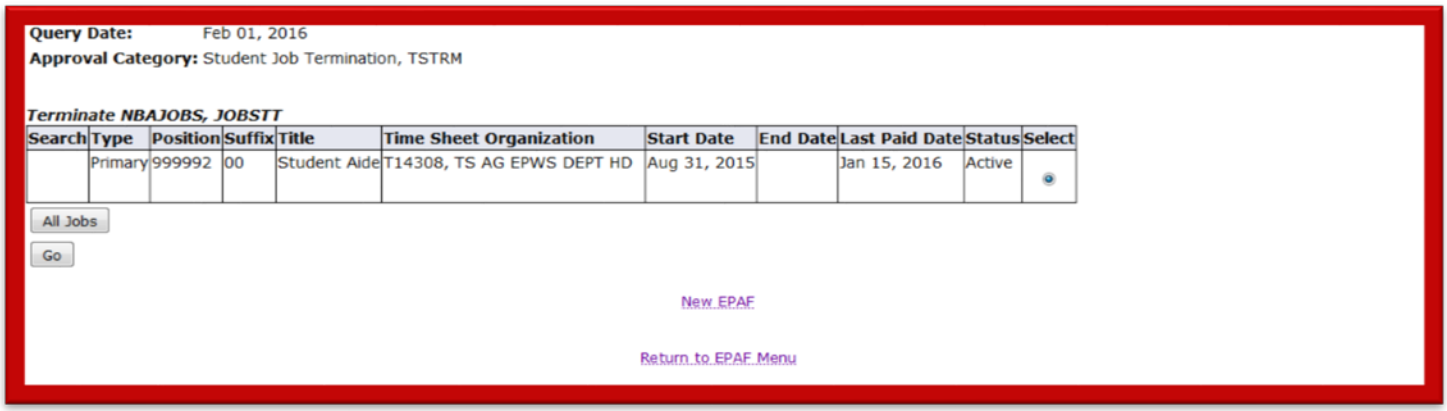
The query date is used to find jobs and display the job status for each job as of the query date entered. The query date is also used to default values on the EPAF detail screen.

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 terminate.***

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

Terminate NBAJOBS Screen



Query Date: Feb 01, 2016
Approval Category: Student Job Termination, TSTRM

Terminate NBAJOBS, JOBSTT

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	Primary	999992	00	Student Aide	T14308, TS AG EPWS DEPT HD	Aug 31, 2015		Jan 15, 2016	Active	

All Jobs

Go

New EPAF

Return to EPAF Menu

1. ***Select position number***
   Before you begin the EPAF process you must selected an active position number you will be affecting with the EPAF transaction. Selecting the correct active position suffix is important because it helps to maintain a clear employment history for the employee records in banner.

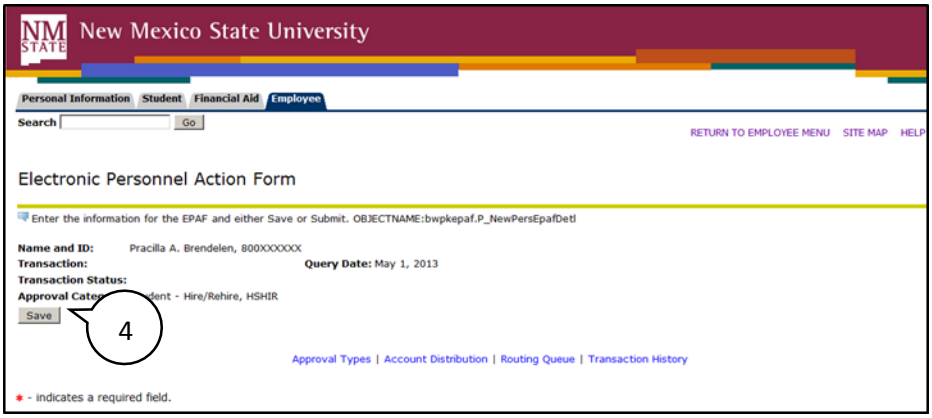
   Student positions are hired using a single pooled position number: **999992**

   Note: The University has moved to a single pooled position number, effective with the EPAF implementation, which will be utilized for all regular, work-study and Co-Op student employment. *Do not use previous student hire position numbers.*

2. ***Click Go***

3. ***Click Save.***

Remember to click <u>Save</u> before continuing to complete the EPAF form.



Terminate-Job Termination/NBAJOBS

Terminate NBAJOBS, 999992-00 Student Aide, Last Paid Date: Jan 15, 2016

Item	Current Value	New Value
Job Status: *(Not Enterable)	Active	T
Jobs Effective Date: MM/DD/YYYY*	01/01/2016	
Personnel Date: MM/DD/YYYY*	01/01/2016	
Job Change Reason: *(Not Enterable)	LABOR	TERMJ
Contract Number:	298753	

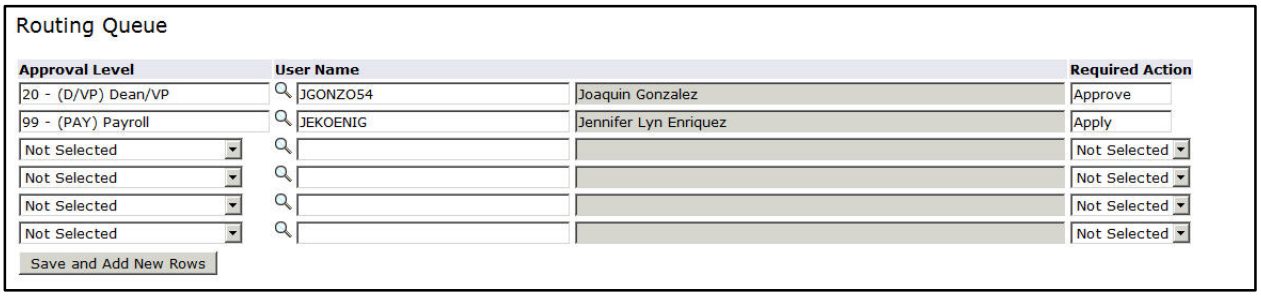
1

1. Personnel Date
   This is the date the employee will be terminated from this position. The value entered for the Personnel date will be used to determine the Job End Date.

Routing Queue Section

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

You can default the routing queue used for each EPAF Category to specify the approvers used for future transactions. If you set-up the default routing queue you can still specify different approvers if necessary for each transaction. See the *Default Routing Queue* section (pg. 31) for additional details.



All EPAF's have a minimum of two levels of approvals: Dean/VP and Payroll. The Payroll level **does not approve or review the transaction in any way,** rather the Payroll level simply loads the EPAF records into Banner. **Only the approver selected for the Dean/VP level will review and approve the transaction.**

1. Enter the **User Name** for each level of approver
    a. The search function can be used by clicking on the magnifying glass to the left of user name
    b. For the **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

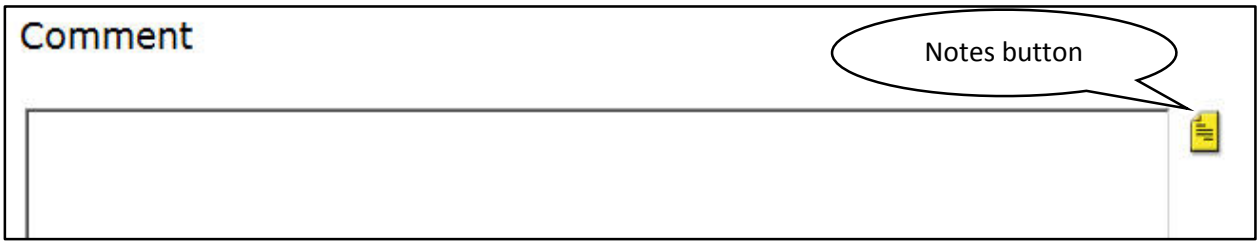
Comment

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 Dean/VP approval level. Both originators and approvers will be able to see the comments in the originator or approval summary screens respectively.

Adding comments to an EPAF

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

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



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

Note: Comments cannot be deleted.