EPAF Handbook @ DSU

This handbook contains instructions and guidelines for submitting successful EPAFs. It is our recommendation that you keep the first two pages of this handbook at your desk and refer to them often when completing EPAFs:

Table of Contents:
1. Introduction, Cheat Sheets, and other Helpful Reminders.................................................................................................................................................................................. Page 1
2. EPAF Error Troubleshooting........................................................................................................................................................................................................ Page 2
3. EPAF Starting Screens and Name Searches.................................................................................................................................................................................. Pages 3 – 6
4. Terminating a part-time employee's position (HTERM)...................................................................................................................................................... Pages 7 – 10
5. Changing a part-time employee's pay rate and/or job title (HPAY)........................................................................................................................................ Pages 11 – 16
6. Modifying a part-time employee's account index (HACCT)........................................................................................................................................ Pages 17 – 20
7. Changing a part-time employee's timesheet supervisor (HSUP)........................................................................................................................................ Pages 21 – 24
8. Creating a new part-time job/position (STUNEW, SUMNEW, and HRLNEW – sample shown is a STU999 job/position)*................................................................ Pages 25 – 28
9. History Features of EPAF System (finding an completed EPAF or one in the approval process)........................................................................................................ Pages 35 – 38

Instructions & Cheat Sheets

Electronic Personnel Action Forms (EPAFs) allow departments to use the myDixie system to submit payroll action information for their part-time staff employees. This system allows for greater portability of forms as users need only have access to the Internet to create/submit/view forms. It also allows for a history of forms to be kept and better security with data locked within myDixie. By going to an electronic format, time of processing personnel actions is generally increased, as well as decreased numbers of mistakes, phone calls, inquiries, etc.

Throughout this packet are various blue boxes and red text. Pay particular attention to these as they will help you understand employment classification, account numbers, and troubleshoot within the forms. Examples of them are as such:

Cheat Sheet for Hourly Payroll Account #s:

- **660400** – Student Employees
- **660300** – Summer Employees
- **660300** – Non-Student Hourly Employees

Cheat Sheet for Hourly Position Numbers:

- **STU999** – Student Employees (enrolled for 6+ credit hours in any given semester)
- **SUM999** – Summer Employees (enrolled for 6+ credits Fall/Spring but not in summer)
- **HRL999** – Hourly Employees (not enrolled for at least 6 credit hours)

*We have only shown a sample of how to create a student position within this tutorial packet. Summer and Hourly Position EPAFs are done similarly, but with a few changes that are detailed below:

**Differences between the student STUNEW EPAF and the summer SUMNEW EPAF:**
- The position number for student jobs is STU999, whereas the position number for summer jobs is SUM999.
  - Each position number can utilize all available suffix numbers, starting with 00. Some student workers continue working at DSU during the summer when they are not enrolled, so please use the correct suffix numbers in order (00, 01, 02, etc.) for each type of position number. **Example:** one student may have used up to suffix number 05 with STU999 positions, but their first ever summer job should be set up as SUM999-00, etc.
- The 6-digit account number is 660400 for student jobs and 660300 for summer jobs.
- DSU HR & Payroll analyze summer semester enrollments and will automatically switch STU positions to SUM positions at the start of summer semester, as well as switches from SUM to STU at the start of fall semester. SUMNEW EPAFs are only done when you are hiring someone during the summer who isn’t enrolled for summer, but is enrolled for 6+ credits in the upcoming Fall Semester.

**Differences between the student STUNEW EPAF and the hourly HRLNEW EPAF:**
- The position number for student jobs is STU999, whereas the position number for hourly jobs is HRL999.
Each position number can utilize all available suffix numbers, starting with 00. Some student workers return to DSU after graduation or work on campus but take a semester off from classes, so please use the correct suffix numbers in order (00, 01, 02, etc.) for each type of position number. Example: one student may have up to suffix number 05 with STU999 positions, but their first hourly job should be set up as HRL999-00, etc.

The 6-digit account number is 660400 for student jobs and 660300 for hourly jobs.

**EPAF Error Trouble-Shooting**

EPAFs themselves are quite easy to complete, as each form is customized to only the required fields for completion and include a freeform comment box for justification, explanation, etc. That said, you may run into the occasional error. Here are the most common error messages and how to fix them:

- **"New...Date should be >= query effective date"** – you are putting in begin/effective dates that are BEFORE your query date. The only ways to fix this are 1) delete the EPAF, use a different query date, and start over OR use dates equal or after your current query date. This is why it is so imperative to change the query date to the first day of the applicable month or pay period before you even get to the actual EPAF form to complete. Remember, job start dates should be actual start dates; change effective dates should be the 6th or 20th (to align with the start of a pay period), and termination dates should be either the 5th or 20th (to align with the end of the pay period).

- **"Invalid Date"** – this is typically because you didn’t use the right date format. All dates in EPAFs must be MM/DD/YYYY (include the backslashes).

- **"...Date must equal...date"** – the date fields within the EPAF (job begin, jobs effective, and/or new effective) do not match. They must match to remove this error.

- **"Account Code must be filled in"** – once you insert your index and save the EPAF, Banner automatically deletes the 6 digit account number. You have to put the account number in (see previous page of cheats for these), save, and then resubmit. This removes the error.

- **"User ID must be entered for Routing Queue"** – you have a blank line within your routing queue. Each EPAF Initiator is set up by HR to have specific personnel approve their forms. Most departments never have to put in names for their routing queue (unless the initiator submits EPAFs for a large department with multiple supervisors, in which case that initiator must always insert a supervisor into the routing queue). If you are not set up as an EPAF Initiator, your routing queue won’t have any names in it. Please contact your EPAF Initiator to have them complete the forms (there is at least one in every area on campus) – those initiators are set up to initiate EPAFs and it will work fine for them. Contact Human Resources if your department does not have an EPAF Initiator or you don’t know who that person is.

- **"ID is not defined as an employee"** – you have tried doing an EPAF for a person who has never worked on campus. A person search early in the process would have told you this prior to spending time trying to complete an EPAF. Please delete the EPAF and send the employee to Human Resources to complete new hire paperwork (I9, W4, Direct Deposit) while you submit a part-time assignment form.

- **"End Date must be later than Begin Date" + others** – this typically means that when trying to create a new position, you selected a position and suffix number combination that had already been used for that employee. Delete the EPAF and be sure during the All Jobs search that you use a position & suffix number that have never before been used.

- **Multiple "New...Date cannot be after Employee’s Termination Date" errors** – this employee’s last paid date for DSU was more than one year ago. As such, before the EPAF can be submitted, the employee must complete a new I9. Send them to the DSU HR office and leave your EPAF in your queue. Once the I9 has been completed, we will notify you and you can submit the EPAF. The errors should disappear.

- **Lots and lots of error messages on just about everything – HELP!** – Most likely, you didn’t confirm that a position & suffix number appeared at the top for the new job you are creating or the existing job you are modifying. Scroll to the top of the EPAF and see if there is a position & suffix number listed in bold black text. If there is nothing listed, then Banner doesn’t have any job to link your data to, hence the error messages. You will need to start the EPAF over; pay particular attention to the job selection screen to ensure that a position & suffix number pull in.
EPAF Starting Screens and Name Searches
To access EPAFs, you will need to log into myDixie. Once you have logged in, it brings you to the following main menu:

Click on Employee Information, which will bring you to the following page:

Employee

Request Time Off
Must be on campus to use.

Pay Information
View your Direct Deposit breakdown; View your Earnings and Deductions History; View your Pay Stubs.

Tax Forms
Change W-4 information; View your W-2 Form or T4 Form.

Time Off Current Balances and History

Faculty Load and Compensation

Starfish Early Alert

EPAF Main Menu

From here, click on EPAF Main Menu. If you don’t have the EPAF Main Menu as an option, please call Human Resources to verify you have been set up to initiate or approve EPAFs – this link is given on an individual basis only to active EPAF Initiators, Approvers, and HR & IT Administrators. Once this setup has occurred, the link will be activated.
Under EPAFs, there are two or three options as follows. To create a new EPAF, click on New EPAF:

**Electronic Personnel Action Form**

- EPAF Approver Summary
- EPAF Originator Summary
- New EPAF

At this point, you will need to do a query to find the employee you will be creating an EPAF for. Click on the magnifying glass icon:

**New EPAF Person Selection**

Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go.

* indicates a required field.

**ID:**

**Query Date:** MM/DD/YYYY 05/03/2018

**Approval Category:** Not Selected

Go
To search for an employee, you can insert the name, the DixieID, or a Social Security Number. For our example here, we’re going to search for **Denzel Strong** and **Emily Flores**. We’ll start with **Denzel**. Enter a piece of information (like the name) and click on **Go**.

**Person Search**

Check the box to limit the search to an Employee. Enter the Last Name and or First Name, or enter an ID, or enter the SSN/SIN/TIN. Select Go. A percent sign may be used as a wildcard.

**Search Criteria**

- **Last Name:** Strong
- **First Name:**
- **ID:**
- **SSN/SIN/TIN:**
- **Records per Page:** 25

**To choose a person, select a link under ID.**

<table>
<thead>
<tr>
<th>ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Birth Date</th>
<th>Name Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>00215047</td>
<td>Strong</td>
<td>Sonja</td>
<td>Katelynn</td>
<td></td>
<td></td>
</tr>
<tr>
<td>00315458</td>
<td>Strong</td>
<td>Traci</td>
<td>C</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**This search will only pull in current or previous DSU employees.** As shown below, the search has 2 different employees with the last name of Strong, but no Denzel. This means Denzel has not been an employee at DSU and will need to go through the paper process with Human Resources (no EPAF can be done at this point). After HR receives paperwork, Denzel will appear in future queries.
Now, let’s try searching for **Emily Flores**. Type in her last name and click on Go:

**Person Search**

- **Search Criteria**
  - Last Name: Flores

The search yielded 3 names, meaning there are 3 employees with the last name of Flores that have worked on campus. We can see that Emily is on this list; since people can share the same first & last name, please use the middle name/initial or birthday to confirm you have the correct individual. Once confirmed, click on the DixieID and it will insert the DixieID back on the New EPAF screen:

**HR Hint:**

When doing a person search, we recommend using only last names or the DixieID (as given to you by the employee) as some individuals go by their middle name, nicknames, or may have changed their name since their last work assignment. The SSN should only be used to query if you are unable to find the person by name or DixieID.

This concludes the starting screens and name searching portion of the handbook. Next we move to completing EPAFs themselves.
**Terminating a part-time Employee's Position (HTERM)**

After doing the person search, your screen will look like the following. Change the query date to the first day of the month or pay period of your modification or new job and select which EPAF you will be doing (Approval Category) from the drop-down menu. Select the **Terminate a part-time employee's position (HTERM)** and click Go:

We will now select the position we want to terminate. All the employee's open jobs are listed, which will list their position and suffix number, job title, timesheet location, start date, and last paid date. Move the select bubble to the job you wish to end, then click Go:
Insert a termination date below (typically the 5th or 20th of their pay period of work; if you have procrastinated submitted a termination EPAF, you can use the last paid date), as well as the appropriate job change reason, such as:

* VTERM: voluntary resignation/quit
* EOA: end of assignment
* EOYA: end of academic/fiscal year assignment
* RETIR: retirement
* TERM: termination (involuntary/discharge/fired)
* CNOTR: contract not renewed

Electronic Personnel Action Form

Enter the information for the EPAF and either Save or Submit.

Name and ID: Test Student, 00220949
Transaction: [Field skipped]
Transaction Status: Terminate a part-time employee’s position, HTERM
Approval Category: [Field skipped]

Query Date: May 01, 2018
Last Paid Date: May 01, 2018

Once you have entered this information, you can save the EPAF. If you have completed the fields correctly, you will get a message saying the EPAF was saved successfully and the EPAF will be assigned a transaction number as well as a transaction status. It will also tell you whether there are any errors that need correcting.

Terminate a part-time employee's job/position, STU999-00 HR EPAF Tutorial Test Case

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs Effective Date:</td>
<td>02/06/2018</td>
<td>05/05/2018</td>
</tr>
<tr>
<td>Job Status: <em>(Not Enterable)</em></td>
<td>Active</td>
<td>T</td>
</tr>
<tr>
<td>Job Change Reason: *</td>
<td>REHIR</td>
<td>EOYA, End of Acad/Fiscal Year Job</td>
</tr>
</tbody>
</table>

Once you have entered this information, you can save the EPAF. If you have completed the fields correctly, you will get a message saying the EPAF was saved successfully and the EPAF will be assigned a transaction number as well as a transaction status. It will also tell you whether there are any errors that need correcting.
Below the fields you just completed is the routing queue of approvals for your EPAF, which include you as the EPAF originator. These electronic approvals should be the same as when completing a paper P/T Assignment Form. The EPAF approver will have access to this and any EPAF you create, and will be required to approve each EPAF created. Below the routing queue is a freeform comment box. Comments are required for any termination EPAF before HR can process it. After adding comments, click on Save again.

### Terminate a part-time employee's job/position, STU999-00 HR EPAF Tutorial Test Case

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs Effective Date: MM/DD/YYYY*</td>
<td>02/06/2018</td>
<td>05/05/2018</td>
</tr>
<tr>
<td>Job Status: *(Not Enterable)</td>
<td>Active</td>
<td>T</td>
</tr>
<tr>
<td>Job Change Reason: *</td>
<td>REHIR</td>
<td>EOYA, End of Acad/Fiscal Year Job</td>
</tr>
</tbody>
</table>

#### Routing Queue

<table>
<thead>
<tr>
<th>Approval Level</th>
<th>User Name</th>
<th>Required Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 - (DEPT1) Department Submission</td>
<td>AHOFER</td>
<td>FYI</td>
</tr>
<tr>
<td>20 - (DEPT2) Department/Budget Approval</td>
<td>TROSENB1</td>
<td>Approve</td>
</tr>
<tr>
<td>90 - (APPROV) HR Approval</td>
<td>MCHAPM11</td>
<td>Approve</td>
</tr>
<tr>
<td>95 - (APPLY) HR Apply</td>
<td>MCHAPM11</td>
<td>Apply</td>
</tr>
</tbody>
</table>

Not Selected

Save and Add New Rows

#### Comment

![Comment area]

Save

Approval Types | Routing Queue | Comments | Transaction History
You should get a message saying your change was saved successfully (also see EPAF transaction # & transaction status assigned) – if not, please fix errors and resave. Once you have successfully saved the EPAF, click on Submit:

Electronic Personnel Action Form

- Your change was saved successfully.
- Enter the information for the EPAF and either Save or Submit

Name and ID: Test Student, 00220949
Transaction: 10812
Transaction Status: Waiting
Approval Category: Terminate a part-time employee's position, HTERM

Job and Suffix: STU999-00, HR EPAF Tutorial Test Case
Query Date: May 01, 2018
Last Paid Date: 

If submitted successfully, a new message at the top of the page (by a green check box) will say "your transaction was successfully submitted". The EPAF transactions status will change to pending and the EPAF approver will receive an email that they have an EPAF to review/approve (reports sent daily at 10 am & 3 pm). Once the approver approves the EPAF, it will go to HR for processing.