EPAF Handbook @ DSU
This handbook contains instructions and guidelines for submitting successful EPAFs. 
It is our recommendation that you keep this handbook at your desk and refer to it (and the online video tutorials) when completing EPAFs:

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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 (not enrolled for summer)
- **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)

**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.
- The HR & Payroll offices 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 a student during the summer who is not 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 used up to suffix number 05 with STU999 positions, but their first ever 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 might 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 2) 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. Pay/title/supervisor 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 did not 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 date, jobs effective date, and/or new effective date) do not match. They must match to remove this error. Update the dates, save, and then hit submit – if all dates have been fixed, the error is removed.

- **“Account Code must be filled in”** – once you insert your index and hit “default from index”, Banner automatically deletes the 6-digit account number. You have to put the account number in (see previous page of cheats for these numbers), 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 will not have any names in it. Please contact your department’s EPAF Initiator to have them complete the EPAF (there is at least one in every department on campus) – those initiators are set up to initiate EPAFs and their routing queue is already set up by HR and IT. Contact Human Resources if your department does not have an EPAF Initiator or you do not know who that person is – we are happy to set up additional EPAF initiators or approvers as needed.

- **“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 is 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 did not 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 does not 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.

EPAFs have an email workload that will automatically email EPAF initiators when HR has processed an EPAF as well as when an EPAF is returned for correction and needs to be fixed for resubmission. An email will also go to the supervisor when they need to approve an EPAF.
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

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, IT Administrators, and HR Administrators**. Once this setup has occurred, the link to the EPAF Main Menu 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. While you may already know the DixieID of the person you wish to hire or modify, and can enter it into the ID box, we strongly recommend doing the below search method when you are trying to create a job for an employee you have never hired before. The EPAF system will only work for individuals with a past or current employment record at DSU, not anyone with a DixieID.

To perform an employee search, 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.

HR Hint:
Always update the query date to the first day of the month in which you want your EPAF to be effective. For example, if you want to hire a person effective November 6, use November 1 as your query date. If you want to give someone a pay raise as of August 21, use August 1 as your query date.

Once you have entered the employee’s DixieID (or completed the search process to find the employee’s DixieID as explained in pages 5-6 of this packet), update the query date to the first day of the month in which you want your EPAF to be effective (e.g. the month you are hiring/rehiring and/or want the pay/title/index change to start). You can then select the EPAF type you want to complete from the “Approval Category” menu.

Tutorials on how to complete the different types of EPAFs are found on the DSU Human Resources page, under “Part-Time Employment Forms” and “EPAFs”. The direct link is https://humanresources.dixie.edu/epaf-introduction/.
To search for an employee, you can insert the name, the DixieID, or a Social Security Number. For our example here, we are going to search for **Denzel Strong** and **Emily Flores**. We will start with **Denzel**. Enter a piece of information (like the name) and click on Go:

**Person Search**

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

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**

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:

**Person Search Results**

This concludes the starting and name-searching portion of the handbook. Now we’ll explore the history features of the EPAF system.
History Features of EPAF System (finding a completed EPAF or one in the approval process)
The EPAF system is built to allow users to search for EPAFs they have either initiated or approved during the last 30 months (2.5 years). This allows for quick and easy access to previously submitted forms for use as templates or to retrieve forms that need to be corrected/resubmitted for approval.

For EPAF Initiators: once you have clicked on the “EPAF Main Menu” link to enter the EPAF system within myDixie, click on EPAF Originator Summary:

Within the EPAF Originator Summary are two tabs: Current and History. The system defaults you to “Current”. The “Current” tab will show any EPAFs that an Initiator has started but has not yet submitted AND any EPAFs returned to the initiator for correction. To complete/submit or void these EPAFs, simply click on the employee name (which will be in blue text) to enter the EPAF, either complete/submit or void the EPAF, and it will be moved from your “Current” tab into the “History” tab. If no EPAFs are pending submission, correction, or approval, you will get a screen like this:
Clicking on the “History” tab will show you any EPAFs you have initiated over the last 30 months. This list will automatically be sorted alphabetically by last name, but can be resorted by any of the columns shown below (ID, transaction number, submission date, etc.). To resort the columns, click the yellow arrows by each column heading. To look at EPAF contents, simply click on the employee name (blue text) to enter the EPAF. Any EPAFs with a comment by them will include a link to those comments (also in blue text):

Each EPAF will have a unique transaction status associated with it. Transactions status are as follows:

- **Waiting** = EPAF has been saved (e.g. assigned an EPAF transaction number) but has not been submitted.
- **Pending** = EPAF pending approval by either department head or HR
- **Approved** = EPAF has been approved by HR and is pending processing into Banner
- **Completed** = EPAF has been processed into Banner by HR
- **Return for Correction** = EPAF has been sent back to the Initiator for additional changes (i.e. reason for leaving employment, change an effective or termination date to match a pay period start/end date, etc.). What changes are needed should be listed in the comments; EPAFs returned for correction must be corrected and resubmitted for approval before they are processed.
- **Voided** = EPAF has been voided at some point in the approval process; these EPAFs do not feed directly into Banner. However, as needed, HR may manually process an EPAF that is unable to feed directly to Banner. When doing this, HR will note it in the EPAF comments and notify the EPAF initiator.
For EPAF Approvers: you will get an email when you need to approve an EPAF. To approve EPAFs or view history of approved EPAFs: after you have clicked on the “EPAF Main Menu” link to enter the EPAF system within myDixie, click on EPAF Approver Summary:

Within the EPAF Approver Summary are three tabs: Current, In My Queue, and History. The system defaults you to “Current”. The “Current” tab will show any EPAFs that require your approval. To review/approve or review/return for correction these EPAFs, simply click on the employee name (which will be in blue text) to enter the EPAF to review it:
After clicking on the employee’s name, you will be brought to this screen to review the EPAF. All fields on the EPAF are listed here, as well as boxes for “Approve” or “Return for Correction.” If you approve of the EPAF and all fields listed, click “Approve” and the EPAF will be sent to HR for processing. If you see information that needs correction, add a comment to the EPAF about the necessary changes and click “Return for Correction” so the EPAF Initiator will be emailed and can fix the form:

After taking action on the EPAF, click on the “EPAF Approver Summary” to return to the previous menu.
Clicking on the “History” tab will show you any EPAFs you have approved over the last 30 months. This list will automatically be sorted alphabetically by last name, but can be resorted by any of the columns shown below (ID, transaction number, submission date, etc.). To resort the columns, click the yellow arrows by each column heading. To look at EPAF contents, simply click on the employee name (blue text) to enter the EPAF. Any EPAFs with a comment by them will include a link to those comments (also in blue text):

This concludes the information related to the EPAF history features. All trainings related to how to complete the various types of EPAFs can be found through short video tutorials of 3-5 minutes each and are located on the Human Resources webpage, under Part-Time Employment Forms and EPAFs (https://humanresources.dixie.edu/epaf-introduction/).

Please contact Human Resources if you have any questions about this handbook, EPAF tutorials, or access to the EPAF system.