

# Electronic Personnel Action Form (EPAF) User Guide



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## Introduction

An EPAF is an Electronic Personnel Action Form; an online form, originated by a department to submit employment data changes. EPAFs replace paper forms in processes such as hiring a student employee, updating job labor distribution, replacing some letters of offer, and more.

Each EPAF action has pre-assigned approval levels, which represent electronic signatures approving the transaction.

## EPAF User Types

There are three different types of EPAF users:

- **Originators** – users who begin an EPAF action
- **Approvers** – users who must approve an EPAF action
- **Proxies** – users who are designated by an Approver with specific authority to approve actions on the Approver's behalf

## EPAF User Guide Menu

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### [Approver Summary](#)

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# EPAF User Guide

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## Accessing EPAF

To access EPAF:

1. Log into the PSU Information System (<https://banweb.pdx.edu>.)



## PSU Information System

 Please enter your PSU ID Number or Odin ID and your password. Then click Login.

To protect your privacy, please Exit and then close your browser when you are finished using the PSU Information System.

**Forgot your password?** Enter your PSU ID Number or Odin ID then click Forgot password?.

*By logging into the PSU Information System, you indicate that you have agreed to the [PSU Acceptable Use Policy](#).*

Portland State's portal, [myPSU](#), is here!

Students and employees can now join the myPSU portal. This interface is a one-stop site for all PSU information and comm employee information, and other news. First-time users of the portal need to synchronize their Portland State computer ac OAM (Odin Account Manager). Then, using the Odin ID and new password, students and employees can go to [myPSU](#) ([http](#) customize their portal site.

Odin Username or PSU ID Number:

Password:

Sign in using your ODIN information

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# EPAF User Guide

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2. Choose the Employee Services tab.
3. From the Employee Services tab, select “EPAF: Electronic Personnel Action Form.”



## Employee

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- [Time Sheet](#)
- [Request Time Off](#)
- [Benefits and Deductions](#)  
Retirement, health, beneficiary, and Rec Center membership.
- [Pay Information](#)  
Direct deposit allocation, earnings statement, and deductions history.
- [Payroll Tax Forms](#)  
W4 information and W2 form.
- [Jobs Summary](#)
- [Leave Balances](#)
- [EPAF: Electronic Personnel Action Form](#)
- [Notice of Appointment](#)
- [Administrative \(View Other\) Pages](#)

EPAF link

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# EPAF User Guide

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## EPAF Menu

Based on your EPAF role, you will be granted access to one or more of the following EPAF links:

- EPAF Approver Summary
- EPAF Originator Summary
- New EPAF
- Act as a Proxy
- Proxy Setup
- Default Routing Queue

## PSU Information System

[Personal Information](#) / [Employee Services](#) / [Finance](#)

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### Electronic Personnel Action Form

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[EPAF Approver Summary](#)  
[EPAF Originator Summary](#)  
[New EPAF](#)  
[Act as a Proxy](#)  
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[Default Routing Queue](#)

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# EPAF User Guide

## EPAF Originator Summary

The EPAF Originator Summary displays only those transactions that you have originated that are still waiting to be approved or applied. This page contains two tabs: Current and History.

### EPAF Originator Summary

**Current** History

Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

✓ Filtering On

Transaction Status:   Go

[New EPAF](#) | [Default Routing Queue](#) | [Search](#) | [Superuser or Filter Transactions](#)

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**EPAF Transactions**

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
<a href="#">Zachary R.</a> VGD S Student Regular-Vngrd, D98383-00		56424	Hire a REGULAR wage student for the FIRST time		25-JUL-2012	Waiting	<a href="#">Comments</a>
<a href="#">Elisabeth R.</a> DRS S Student Regular, D98319-00		56366	Hire a REGULAR wage student for the FIRST time		16-JUL-2012	Waiting	<a href="#">**Comments</a> <a href="#">Errors</a>
<a href="#">Debra S.</a> GGR S Student Regular, D98257-00		56416	Hire a REGULAR wage student for the FIRST time		16-JUL-2012	Waiting	<a href="#">Comments</a>
<a href="#">Staci A.</a>		56389	Hire a REGULAR wage student for the		26-JUL-2012	Waiting	<a href="#">Comments</a>

## Current Tab

The Current tab shows two types of EPAFs: *Waiting* and *Return for Correction*.

### EPAF Originator Summary

**Current** History

Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

Transaction Status:   Go

[New EPAF](#) | [Default Routing Queue](#) | [Search](#) | [Superuser or Filter Transactions](#)

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**EPAF Transactions**

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
<a href="#">Christina A.</a> HRC S Student Regular, D97877-00	941328522	54543	Student Regular Hire		01-AUG-2012	Waiting	<a href="#">Comments</a>

- *Waiting* – If an EPAF has been created and saved but not submitted, it remains in the *Waiting* status. You can submit the EPAF later by clicking on the EPAF and submitting.
- *Returned for Correction* - If an EPAF contains an error or incorrect data, the Approver can return it for correction. To view a returned EPAF, click on the employee’s name. The Originator will be given three options: Delete, Void or Update.

# EPAF User Guide

## EPAF Preview

✓ You are acting as an Originator.

**Name and ID:** Christina Annette Kraus, 941328522 **Job and Suffix:** D97877-00, HRC S Student Regular  
**Transaction:** 54543 **Query Date:** 01-AUG-2012  
**Transaction Status:** Waiting **Last Paid Date:**  
**Approval Category:** Student Regular Hire, SHRHIR

[Update](#) | [Add Comment](#)

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

\* - indicates a required field.

- Click on “Delete” to delete the EPAF **before** it is submitted.
- Click “Void” if you would like to delete the EPAF **after** it has been submitted.
- Click “Update” to make changes to the EPAF.

NOTE: Only the Originator can make changes to the EPAF. If changes are made, the Originator must send and submit the EPAF for re-approval at all levels.

## History Tab

All EPAFs created by the Originator are stored in the History tab. To check on the status of an EPAF, click on the History tab and view the status under “Transaction Status”.

### EPAF Originator Summary

**Current** | **History**

Select the link under Name to access details of the transaction, or select the link under Transaction to update the transaction.

Transaction Status:

[New EPAF](#) | [Default Routing Queue](#) | [Search](#) | [Superuser or Filter Transactions](#)

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#### EPAF Transactions

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Transaction Status	Links
Kraus, Christina A. AFM S Student Workstudy, D98416-00	941328522	54544	Student Regular Hire	09-AUG-2012	01-AUG-2012	Pending	<a href="#">Comments</a> <a href="#">Warnings</a>

1 - 1 of 1

### Transaction Statuses

- *Pending* – EPAF is pending approval
- *Complete* – EPAF has been completed and applied to the employee's record
- *Returned* – EPAF has been returned for correction
- *Voided* – EPAF was voided
- *Overridden* – EPAF was overridden and approved at the HR level
- *Removed from Queue* – EPAF has been returned to the Originator for correction, thus is removed from the Approval Queue

# EPAF User Guide


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## New EPAF

The New EPAF screen is where an EPAF is created by an Originator.

### New EPAF Person Selection


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 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: \*   

Effective Date: MM/DD/YYYY\*

Approval Category: \*  

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)  
[Return to EPAF Menu](#)



# EPAF User Guide

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## How to Originate an EPAF (For a Student Hire)

On the EPAF menu, select "New EPAF."

### PSU Information System

**Personal Information** **Employee Services** Finance

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## Electronic Personnel Action Form

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[EPAF Approver Summary](#)

[EPAF Originator Summary](#)

[New EPAF](#)

[Act as a Proxy](#)

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## Employee Selection

Enter the employee's PSU ID into the ID field. If you do not know their ID number, you can search for it by clicking on the magnifying glass icon.

### PSU Information System

**Personal Information** **Employee Services** Finance

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[RETURN](#)

## New EPAF Person Selection

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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: \*    Click this icon to search for ID

Effective Date: MM/DD/YYYY\*

Approval Category: \*

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)  
[Return to EPAF Menu](#)

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## Effective Date

The effective date is the date this transaction is effective (for example: the first day of work must be used for a student hire date). This date field will default to today's date and YOU MUST update it to reflect the actual action's effective date.

# EPAF User Guide

## Approval Category

Select the Approval Category that is appropriate for the transaction you are initiating. Click “Go”.

## PSU Information System

Personal Information Employee Services Finance

### 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.

\* - indicates a required field.

ID: \*

Effective Date: MM/DD/YYYY\* 10/29/2012

Approval Category: \*   
 Not Selected   
 Not Selected   
 Hire a Regular Wage Student Employee, SHRHIR   
 Hire a Workstudy Student Employee, SWSHIR   
 Employee Job Termination, STTRMJ   
 Labor Distribution Change, STLDCH

Primary | EPAF Originator Summary   
 Return to EPAF Menu

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## New EPAF Job Selection

This screen will show you a list of all positions the employee has held at PSU. It will also indicate whether they are still active or not.

New EPAF Job Selection

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

ID:   
 Query Date: 01 JUL-2008   
 Approval Category: Student Regular Hire, SHRHIR

Hire into Hourly Job, HRJOB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="button" value="Q"/>	New Job	<input type="text"/>	<input type="text"/>							<input type="button" value="G"/>
	Primary	D94537	00	HRC UU Acad Empl Coordinator	600300, HRC Human Resource Center	31-MAR-2008	31-OCT-2010	31-OCT-2010	Active	<input type="button" value="C"/>
	Secondary	D98222	00	PHY G Grad Rsch Asst	600300, HRC Human Resource Center	25-JUL-2012	15-JUN-2013		Active	<input type="button" value="C"/>
	Primary	D98831	00	HRC UU Employment Manager	600300, HRC Human Resource Center	01-NOV-2010		31-MAY-2012	Active	<input type="button" value="C"/>

All Jobs   
 Next Approval Type

New EPAF

No end date indicates that the position is still active.

Select

If you are **re-hiring** the employee for a position listed on this screen, select the position number and click “Go”.

If this is a **new position** for the employee, as indicated by the position number not being listed, input the position number and suffix (00) into the *Position* and *Suffix* fields and click “Go”.

# EPAF User Guide

If you do not know the position number, you can search for it by clicking on the magnifying glass icon. This will redirect you to the “New Position Selection” page.

## New Position Selection

Enter search criteria and select Go. Then select the link under Position to select it.

### Search Criteria

**Position Number:**

**Employee Class:**

- UV, Uncl Wage Appointment Salaried
- UW, Uncl Wage Appointment Hourly
- XA, Student Employees
- XB, Grad Assist and Fellows

Students will always be XA

**COA:**

- All
- D, OUS PSU Chart

Select appropriate Org Code

**Budget Organization:**

- All
- 100001, POF President's Office
- 100100, AFM Affirmative Action Office
- 100200, GOV Government Relations

Once you have selected your search criteria, click “Go”. A list of available positions to choose from will be displayed. Click on the appropriate position number link. This will take you back to the New EPAF Job Selection page. Click “Go”.

## New Position Selection

Enter search criteria and select Go. Then select the link under Position to select it.

### Search Criteria

**Position Number:**

**Employee Class:**

- UH, Uncl Non-Teach 12mo < .5 FTE
- UV, Uncl Wage Appointment Salaried
- UW, Uncl Wage Appointment Hourly
- XA, Student Employees

**COA:**

- All
- D, OUS PSU Chart

**Budget Organization:**

- 600026, SUS Sustainability Office
- 600031, FAD Assoc VP Finance & Controller
- 600200, CSS Campus Security
- HRC Human Resource Center

Position number link

Be sure to select the correct position number for the type of student you are hiring (workstudy vs. regular).

### Search Results

Position	Title	Employee Class	COA	Budget Organization	Begin Date	End Date
<a href="#">D97876</a>	HRC S Student Workstudy	XA, Student Employees	D	600300, HRC Human Resource Center	02-FEB-1998	
<a href="#">D97877</a>	HRC S Student Regular	XA, Student Employees	D	600300, HRC Human Resource Center	02-FEB-1998	

[Return to EPAF Menu](#)

Completing the EPAF

The next screen will allow you a final opportunity to change the effective date if needed. It will also ask you to determine whether the contract type is “Primary” or “Secondary”. The position will only be Primary if the employee has no other active positions on campus. Note that many of the data fields are not enterable.

Electronic Personnel Action Form

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

**Name and ID:** [Redacted]  
**Transaction:** [Redacted] **Query Date:** 01-AUG-2012  
**Transaction Status:**  
**Approval Category:** Student Regular Hire, SHRHIR

[Approval Types](#) | [Account Distribution](#) | [Routing Que](#)

\* - indicates a required field.

Hire into Hourly Job, D97877-00 HRC S Student Re

At this point you can update the effective date, but unless you are rehiring, all three dates must be the same.

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*		08/01/2012
Jobs Effective Date: MM/DD/YYYY*		08/01/2012
Personnel Date: MM/DD/YYYY*		08/01/2012
Contract Type: *		Secondary
Accrue Leave: (Not Enterable)		N
Timesheet Orgn:		<input type="text"/>
Job Change Reason: *(Not Enterable)		AAHIR
Regular Rate: *(Not Enterable)		0
Hours per Pay: *(Not Enterable)		173.33
Factor: *(Not Enterable)		12
Pays: *(Not Enterable)		12
Job Status: *(Not Enterable)		A
Step: *(Not Enterable)		0

If employee has no other active jobs on campus, this should be updated to Primary.

# EPAF User Guide

If the employee has already held the position before, there will be a “current value” listed. You must change the “New Value” to match the current value. For example:

[New EPAF](#) |

**Name and ID:** [REDACTED]  
**Transaction:** [REDACTED] **Query Date:** 04-OCT-2012  
**Transaction Status:** [REDACTED]  
**Approval Category:** Hire a Workstudy Student Employee, SWSHIR

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

\* - indicates a required field.

## Hire into Hourly Job, D96789-00 HRC UU Hourly Wage Pool, Last Paid Date: 15-SEP-2012

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY*	12/16/2011	12/16/2011
Jobs Effective Date: MM/DD/YYYY*	09/15/2012	10/04/2012
Personnel Date: MM/DD/YYYY*	09/15/2012	10/04/2012
Contract Type: *	Primary	Secondary
Accrue Leave: (Not Enterable)	No	N
Timesheet Orgn: *	Current Value	600300
Job Change Reason: *(Not Enterable) WAGEE		AAHIR
Regular Rate: *(Not Enterable)	15	0
Hours per Pay: *(Not Enterable)	130	173.33
Factor: *(Not Enterable)	3	12
Pays: *(Not Enterable)	3	12
Job Status: *(Not Enterable)	Terminated	A
Step: *(Not Enterable)	0	0

Update this field only to match “Current Value”

Effective date of the transaction

## Routing Queue

This step will determine who will approve the EPAF transaction. Each EPAF has a pre-established set of approval levels assigned to the action. The Originator must select the appropriate individuals for each level. If you have set up a default routing queue through the main EPAF menu, the users and levels you selected will auto-populate into the Routing Queue’s fields.

### Routing Queue

Approval Level	User Name	Required Action
10 - (DPTADM) Department Admin	[REDACTED]	Approve
80 - (HREMP) Employment Team	[REDACTED]	Approve
99 - (PAYAPL) Payroll Apply	[REDACTED]	Apply
Not Selected	[REDACTED]	Not Selected
Not Selected	[REDACTED]	Not Selected
Not Selected	[REDACTED]	Not Selected
Not Selected	[REDACTED]	Not Selected
Not Selected	[REDACTED]	Not Selected

Approval Levels

**Valid Values - Google Chrome**

Search:

**User Names:**  
 10 - Department Admin  
 DeLange, Nina S. (NDELANGE)  
 Glidden, Christina D. (GLIDDENC)  
 Hutchins, Pamela J. (BABBP)  
 Kutch, Brenna D. (BRENNAK)  
 Robles, Yella G. (ROBLESYG)  
 Turner, April M. (AMTURNER)

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## **EPAF User Guide**

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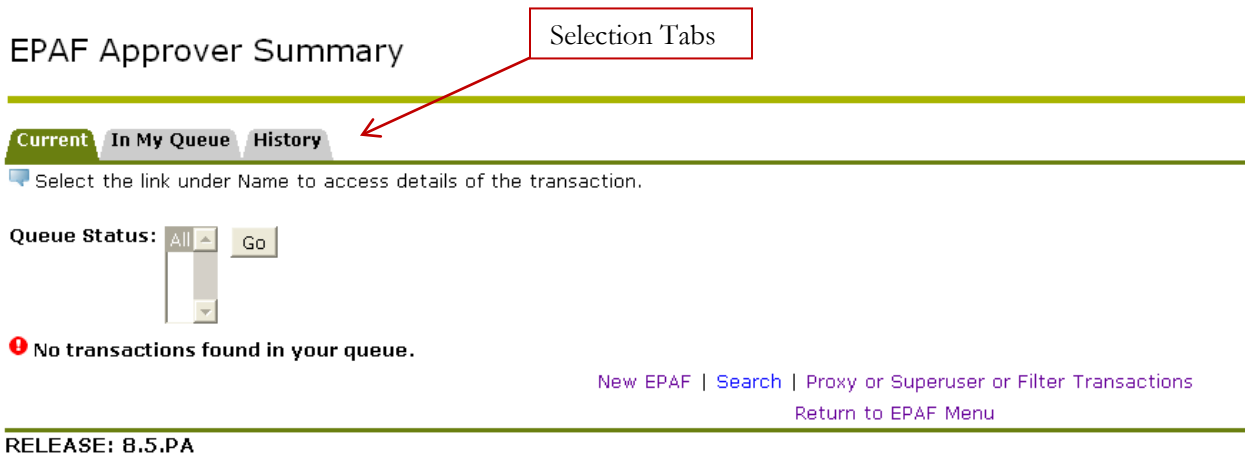
All approval levels automatically listed on the EPAF must have a User Name field populated. Click on the magnifying glass to select from the list of names associated with each level. Do not add any other approval levels.

To route an EPAF for online approvals, click “Save” and then “Submit”. Once you have submitted your transaction without errors you will receive the following message: “The EPAF is now pending approvals”.

# EPAF User Guide

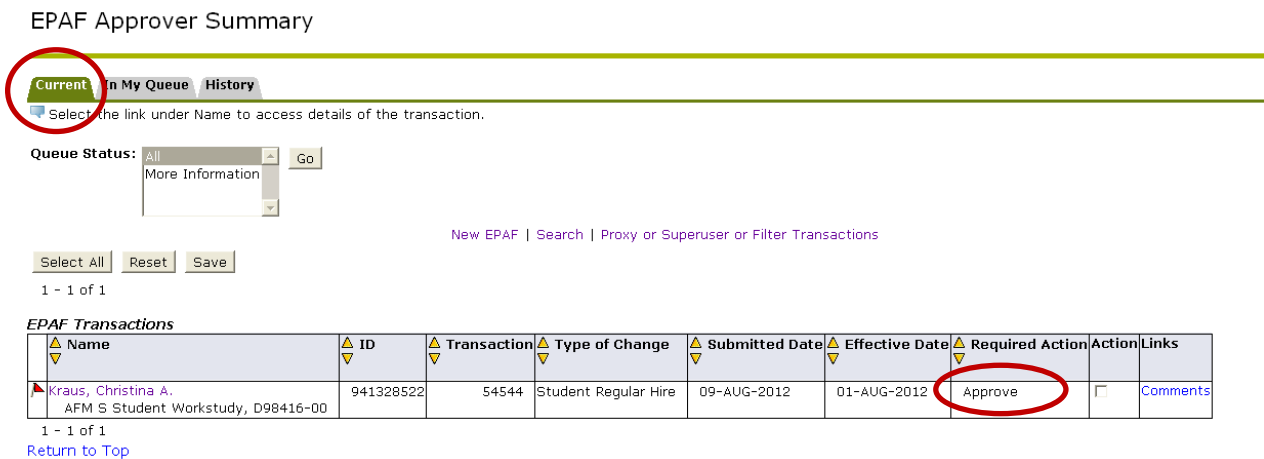
## EPAF Approver Summary

The EPAF Approver Summary page is visible to all users designated as an EPAF Approver. This page contains three tabs: Current, In My Queue, and History. This screen shows all actions that the Approver needs to take action on.



## Current Tab

The Current tab is your EPAF inbox. This is where EPAFs appear that need your approval, and where you receive EPAF FYIs.



## In My Queue

The In My Queue tab shows EPAFs that are still routing through the queues of your selected Approvers. These EPAFs are either submitted but not yet at the Approver level, or have been approved by the Approver, but are waiting other approvals or for HR to apply.

## History

The History tab shows EPAFs that have been approved by the Approver.

Updated 10/29/2012

# EPAF User Guide

## Approving an EPAF

Once an EPAF has been successfully submitted, the Dept. Admin listed in the routing queue must then go in and approve the EPAF. This needs to be done even if the initiator is also the Dept. Admin.

On the EPAF Menu, choose “EPAF Approver Summary.”

## PSU Information System

Personal Information Employee Services Finance

## Electronic Personnel Action Form

- Proxy Setup
- EPAF Approver Summary
- EPAF Originator Summary
- New EPAF
- Act as a Proxy

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If you want to approve an individual EPAF, click on the employee’s name:

New EPAF | Search | Proxy or Superuser or Filter Transactions

Select All   Reset   Save

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**EPAF Transactions**

Name	ID	Transaction	Type of Change	Submitted Date	Effective Date	Required Action	Action Links
SDO S Student Hourly CSP, D94058-00	904436936	57183	Hire a Regular Wage Student Employee	14-SEP-2012	06-SEP-2012	Approve	<input type="checkbox"/> <a href="#">Comments</a>
CDC S Student Regular, D98134-00	931440128	57101	Hire a Regular Wage Student Employee	19-SEP-2012	13-SEP-2012	Approve	<input type="checkbox"/> <a href="#">Comments</a>
NAS S Std Regular, D93744-00	990018957	57219	Hire a Regular Wage Student Employee	21-SEP-2012	17-SEP-2012	Approve	<input type="checkbox"/> <a href="#">Comments</a>
EEP S Student Regular-Tutor, D97129-00	930412801	57414	Hire a Regular Wage Student Employee	21-SEP-2012	12-SEP-2012	Approve	<input type="checkbox"/> <a href="#">Comments</a>
RRI S Student Regular, D98168-00	915330819	57364	Hire a Regular Wage Student Employee	20-SEP-2012	16-SEP-2012	Approve	<input type="checkbox"/> <a href="#">Comments</a>
AUX S Student Regular-HOU, D97771-00	974912793	57251	Hire a Regular Wage Student Employee	18-SEP-2012	09-SEP-2012	Approve	<input type="checkbox"/> <a href="#">Comments</a>
SDO S Student Hourly CSP, D94058-00	971173803	57185	Hire a Regular Wage Student Employee	14-SEP-2012	07-SEP-2012	Approve	<input type="checkbox"/> <a href="#">Comments</a>
SUS S Student Regular, D98125-00	907697264	57295	Hire a Regular Wage Student Employee	19-SEP-2012	16-SEP-2012	Approve	<input type="checkbox"/> <a href="#">Comments</a>
IAS S Student Regular, D97975-00	953338920	57265	Hire a Regular Wage Student Employee	21-SEP-2012	17-SEP-2012	Approve	<input type="checkbox"/> <a href="#">Comments</a>
	979335735	57184	Hire a Regular Wage Student	14-SEP-2012	05-SEP-2012	Approve	<input type="checkbox"/> <a href="#">Comments</a>





# EPAF User Guide


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## Act as a Proxy

This page is only available to users who have been given access to approve actions on the behalf of an Approver. This page allows the proxy Approver to only access relevant EPAF transactions for approval.

### Proxy or Superuser or Filter Transactions

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 Act as a proxy or a superuser and enter the following criteria to filter transactions.

**Proxy For:**

**Act as a Superuser:**

**Submitted From Date:** MM/DD/YYYY

**Submitted To Date:** MM/DD/YYYY

**Transactions Per Page:**

[EPAF Approver Summary](#)  
[Return to EPAF Menu](#)

# EPAF User Guide

## Default Routing Queue

This feature allows you to set up a default routing queue specific to the EPAFs you routinely originate so that you don't need to select Approvers each time you originate the EPAF. You can establish a default routing queue specific to each type of EPAF you routinely originate.

### EPAF Default Routing Queue

## PSU Information System

Personal Information Employee Services Finance

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### Electronic Personnel Action Form

- [EPAF Approver Summary](#)
- [EPAF Originator Summary](#)
- [New EPAF](#)
- [Act as a Proxy](#)
- [Proxy Setup](#)
- [Default Routing Queue](#)

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Select the Approval Category for which you would like to save the routing queue and then click "Go". Please note that you can only save one default per approval category.

### EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category:

Approval Queue

Approval Level	Required Action
<input type="text" value="Not Selected"/>	<input type="text" value="Not Selected"/>
<input type="text" value="Not Selected"/>	<input type="text" value="Not Selected"/>
<input type="text" value="Not Selected"/>	<input type="text" value="Not Selected"/>
<input type="text" value="Not Selected"/>	<input type="text" value="Not Selected"/>

# EPAF User Guide

Select the appropriate person for each approval level by clicking the magnifying glass.

## EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category: Student Regular Hire, SHRHIR

**Approval Queue**

Approval Level	User Name	Required Action
10 - (DPTADM) Department Admin	<input type="text"/>	Approve
80 - (HREMP) Employment Team	<input type="text"/>	Approve
99 - (PAYAPL) Payroll Apply	<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
Not Selected	<input type="text"/>	Not Selected

Valid Values

Search:

User Names,  
10 - Department Admin

- DeLange, Nina S. (NDELANGE)
- Glidden, Christina D. (GLIDDENC)
- Hutchins, Pamela J. (BABBP)
- Kutch, Brenna D. (BRENNAK)
- Robles, Velia G. (ROBLESV)
- Turner, April M. (AMTURNER)

Click “Save and Add New Rows.” Now every time you originate an EPAF for that Approval Category, your routing queue will be automatically populated for you.

## Changing a User Name in the Default Routing Queue

Go back into the Default Routing Queue and select the Approval Category you would like to update and click “Go”.

Click on the magnifying glass for the Approval Level you would like to change, select the correct person, and then “Save and Add New Rows”.

## EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category: Student Regular Hire, SHRHIR

**Approval Queue**

Approval Level	User Name	Required Action	Remove
10 - (DPTADM) Department Admin	BRENNAK	Brenna Deanne Kutch	Approve <input type="checkbox"/>
80 - (HREMP) Employment Team	KRAUSC	Christina Annette Kraus	Approve <input type="checkbox"/>
99 - (PAYAPL) Payroll Apply	BABBP	Pamela Jean Hutchins	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"/>

# EPAF User Guide

## Updating Default Labor Distribution

The EPAF system now allows you to override the default labor distribution. The position will automatically pull in the department’s default index code, or in the case of rehiring on the same position number, the last index code used on their job record. To override the index code, click on the index code listed and overwrite it with the correct index. If you need to add multiple index codes, click “Save and Add New Rows”. \*Once you have added all additional index codes, click “Default from Index”.

**\*Take note of the “Account” code before you “Default from Index” - you will need to re-enter it.**

For student employee job records the account codes will always be:

- 10501 for regular students, and
- 10503 for workstudy students.

Be sure that the sum of labor distribution percentages equal 100%.

### Change Labor Distribution, D97877-00 HRC S Student Regular

Current  
Effective Date: 08/01/2012  
COA Index Fund Organization Account Program Activity Location Project Cost Perc

New  
Effective Date: MM/DD/YYYY 08/01/2012

Account codes:  
 10501 – Regular student  
 10503 – Workstudy student

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
D	HRC001	001100	600300	10501	61500					30.00		<input type="checkbox"/>
D	CHE001	001100	220600	10501	01001					70.00		
<b>Total:</b>										100.00		

Default from Index   Save and Add New Rows

### Errors and Warnings

Once you submit the EPAF, if there are any issues within the EPAF, the screen will show one of two message types:

- **Warning** – Warnings simply deliver information to the user, but will still allow the EPAF to process successfully.
- **Error** – Error messages will not allow the EPAF to progress to the approval levels. Errors must be corrected.

These errors indicate that the employee needs to come to HR to complete or update their new employee mandatory paperwork:

- \*ERROR\* ID is not defined as an employee. Establish Employee Record.
- First Name, SSN/SIN, Birth Date or Gender incomplete.
- \*ERROR\* Job Begin Date cannot be after Employee's Termination Date.
- \*ERROR\* New Effective Date cannot be after Employee's Termination Date.

This error means that the employee already has a job in Banner with this position number:

- \*ERROR\* Begin Date must equal the first Jobs Effective Date.

This error means that the action being initiated has an effective date prior to the last paid date on this job record. Review and correct the entered effective date as needed. If this action is retroactive HR will need to delete the EPAF and enter the action manually.

- \*ERROR\* New effective date must be greater than last date of xxxxxx.

# EPAF User Guide

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## How to Terminate a Job

On the EPAF Menu, select New EPAF.

### PSU Information System

Personal Information **Employee Services** Finance

#### Electronic Personnel Action Form

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[EPAF Approver Summary](#)  
[EPAF Originator Summary](#)  
[New EPAF](#)  
[Act as a Proxy](#)  
[Proxy Setup](#)  
[Default Routing Queue](#)

RELEASE: 8.5.PC

## ID

Enter the employee's PSU ID into the ID field. If you do not know their ID number, you can search for it by clicking on the magnifying glass icon.

### PSU Information System

Personal Information **Employee Services** Finance

[RETURN](#)

#### 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: \*

Effective Date: MM/DD/YYYY\*

Approval Category: \*

[EPAF Approver Summary](#) | [EPAF Originator Summary](#)  
[Return to EPAF Menu](#)

RELEASE: 8.5.0.5.PB

## Effective Date

The effective date is the date this transaction is effective (for example: the last day of work). This date field will default to today's date and YOU MUST update it to reflect the actual action's effective date.

# EPAF User Guide

## Approval Category

Select "Employee Job Termination" and click "Go."

## 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 App

\* - indicates a required field.

ID: \*

Effective Date: MM/DD/YYYY\*

Approval Category: \*

- Not Selected
- Not Selected
- Hire a Regular Wage Student Employee, SHRHIR
- Hire a Workstudy Student Employee, SWSHIR
- Employee Job Termination, STTRMJ
- Labor Distribution Change, STLDCH

Primary | EPAF Originator St  
to EPAF Menu

RELEASE: 8.5.0.5.PB

## New EPAF Job Selection

This screen shows you a list of all positions the employee has held at PSU. It will also indicate whether they are still active or not.

### New EPAF Job Selection

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

ID:   
Query Date: 01-JUL-2008  
Approval Category: Student Regular Hire, SHRHIR

#### Hire into Hourly Job, HRJOB

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
	New Job	<input type="text"/>	<input type="text"/>							
	Primary	D94537	00	HRC UU Acad Empl Coordinator	600300, HRC Human Resource Center	31-MAR-2008	31-OCT-2010	31-OCT-2010	Active	
	Secondary	D98222	00	PHY G Grad Rsch Asst	600300, HRC Human Resource Center	25-JUL-2012	15-JUN-2013		Active	
	Primary	D98831	00	HRC UU Employment Manager	600300, HRC Human Resource Center	01-NOV-2010		31-MAY-2012	Active	

[New EPAF](#)

No end date indicates that the position is still active.

Select the appropriate position

Select the position number of the job that you are terminating and click "Go".



# EPAF User Guide

## Completing the EPAF

Enter the effective date of the termination (last day worked) if different than what you entered on the previous screen. Please note that this must be after the Last Paid Date.

\* - indicates a required field.

### Terminate Job, D98831-00 HRC UU Employment Manager, Last Paid Date: 30-SEP-2012

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY*	02/01/2012	<input type="text"/>
Personnel Date: MM/DD/YYYY*	01/01/2012	<input type="text"/>
Job Change Reason: *(Not Enterable) PEQTY		<input type="text" value="TERMJ"/>
Job Status: *(Not Enterable) Active		<input type="checkbox"/>

Effective date of termination. Both dates should match.

Last Paid Date

## Routing Queue

Approval Level	User Name	Required Action
11 - (DPTADM) Department Admin	<input type="text"/>	Approve
98 - (HREMP) Employment Team	<input type="text"/>	Approve
99 - (PAYAPL) Payroll Apply	<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

## Routing Queue

This step will determine who will approve the termination. Each EPAF has a pre-established set of approval levels assigned to the action. The Originator must select the appropriate individuals for each level. If you have set up a default routing queue through the main EPAF menu, the users and levels you selected will auto-populate into the Routing Queue's fields.

### Routing Queue

The screenshot shows the Routing Queue form with a 'Valid Values' pop-up window. The pop-up window displays a list of user names for the '10 - Department Admin' level. A red box highlights the 'Approval Levels' section of the form, and a red arrow points from this box to the 'Valid Values' pop-up window.

All Approval levels listed on the EPAF must have a User Name field populated. Click on the magnifying glass to select from the list of names associated with each level. Do not add any other Approval Levels.

To route an EPAF for on-line approvals, click "Save" and then "Submit". Once you have submitted your transaction without errors you will receive the following message: "The EPAF is now pending approvals".

The Dept. Admin will now need to go into their Approver Summary to approve the EPAF.

## Terminate Job (Workstudy Only)

All workstudy jobs require a default end date of June 15<sup>th</sup> or before. If you know when you would like the job to end and it is before June 15<sup>th</sup>, enter the date in both of the date fields. Both date fields must match.

### Terminate Job, D97877-00 HRC S Student Regular

Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY		<input type="text" value="06/15/2013"/>
Personnel Date: MM/DD/YYYY		<input type="text" value="06/15/2013"/>
Job Change Reason: (Not Enterable)		<input type="text" value="TERMJ"/>
Job Status: (Not Enterable)		<input type="text" value="T"/>

Update future termination date here.  
Can only be changed to a date **before** June 15<sup>th</sup>.

