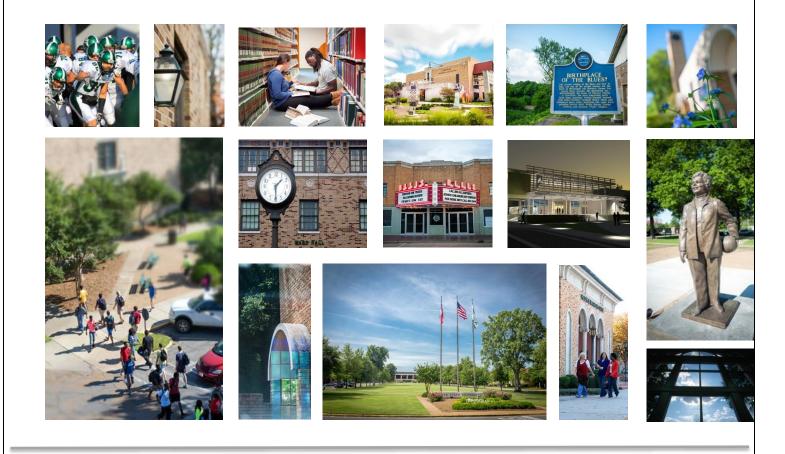


ELECTRONIC PERSONNEL ACTION FORM (EPAF)

Banner Human Resources Self Service User Manual



Release 1.3 January 2018

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OMMON EPAF ERRORS

INTRODUCTION

The Banner system is a web-based, administrative software application developed by Ellucian. This system provides Delta State University with online administrative functionality. This feature enables authorized users to complete Personal actions via the web (Employee Self Service) for authoring that action. The Human Resources system is a complete employee information and management system within the integrated Banner product.

The Electronic Personnel Action Form (EPAF) function of Banner allows the University to process paperless personnel actions. EPAFs are simple, concise, and allow many values or data elements to default into the document without manual data entry. The forms enable the University to achieve our goal to process personnel actions rapidly, through an electronic approval process, providing an audit trail of all approval/disapproval history.

This reference guide provides step-by-step instructions for using the EPAF functionality in Employee Services. It is required that departmental users complete the EPAF training session with a level of competence in order to gain access to the EPAF functionality.

For questions about EPAF processing, please call x4035 for assistance.

EPAF ORIGINATORS

The EPAF process begins with a change or update for an employee's record and/or job. In order to update the system with the new information, an EPAF must be initiated in Employee Self Service. This section provides the originator with information about accessing EPAFs in Employee Self Service, tracking EPAFs, and deleting transactions that have been started but no longer need to be processed.

Accessing EPAF menu in DSU Online Services

To access the EPAF menu, you must have authorization to initiate and/or approve in DSU Online Services. Once you have the appropriate authorizations, you will need to log on to DSU Online Services.

Accessing Employee Self Service through DSU Online Services

Employee Self Service can be accessed through the DSU website:

- 1. Open your internet browser on your computer.
- 2. Click on myDSU.
- 3. Click on Login under DSU online services.
- 4. Click on Login again to gain access to Employee Self Services.





DSU Online is a convenient way to take care of business online for Faculty, Staff, and atudents. Within DSU Online students can register for classes, eneck grades, view unofficial transcripts, pay for tuition, and more. Faculty members can advise students, post grades, view advisees transcripts and more. Students can use these links to access the **Student Handbook** and to access all policies, including grievance procedures, grading, and refund policies, in the **University Policy Manual**.



Canvas is the University's new learning management system (LMS). All online courses and content will be delivered from Canvas beginning June 2013. For additional resources and assistance with Canvas please visit **more information**.

File Edit View Favorites Tools Help

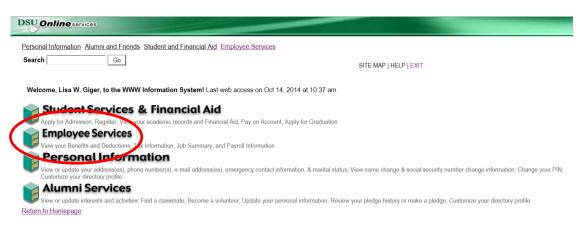




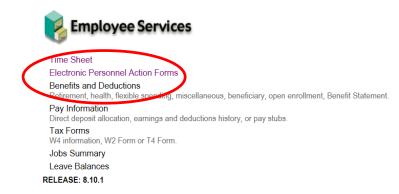
5. Enter your 900# and password.

Please enter your User Identification Number (ID) and your Password. When finished, select Log To protect your privacy, please Exit and close your browser when you are finished. Note: If you have forgotten your password, enter your User ID(UID), then click "Forgot Password?"
Note: If you have forgotten your password, enter your User ID(UID), then click "Forgot Password?"
ogin Forgot PIN?

6. Click on Employee Services.



7. Click on Electronic Personnel Action Forms



8. Click on New EPAF

Act as a Proxy RELEASE: 8.9



How to Search for a Person

Once you are logged into Employee Services and navigated to select the link to enter a new EPAF you will see the following web page. In this section you will learn to search for the person you want to conduct a transaction on.

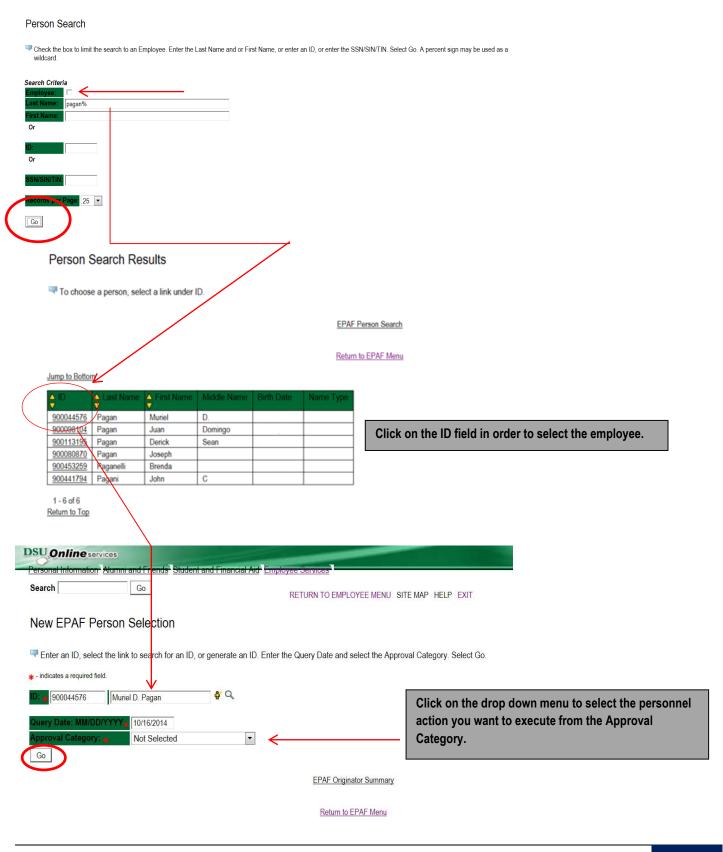
When you do not know the 900 number you can search for it by pressing the magnifying glass icon next to the ID field.

Personal Information	Aumni and Friends Student and Final	incial Aid Employee Services
Search	Go	RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT
New EPAF P	erson Selection	
Enter an ID, sele	ect the link to search for an ID, or genera	ate an ID. Enter the Query Date and select the Approval Category. Select Go.
 indicates a required 		Click on the magnifying glass to
	• • •	> search employee by name
Query Date: MM/D Approval Category		•
Go		
		EPAF Originator Summary
		Return to EPAF Menu
RELEASE: 8.9		
son Search		
eck the box to limit dcard.	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
h Criteria		
oyee: 🗌 🗌 Name: 🔤		
Name:		
SIN/TIN-		
SIN/TIN:	-	

Once you have pressed the magnifying glass icon you will land at the above form. Notice that you can search in 3 different ways for the employee's record that you will want to perform changes to. You can search by "Name", "900 number", or "Social Security Number". After the search information has been entered, CLICK "Go".

To search by using the name you can enter it in the fields provided then press the $\frac{G_0}{G_0}$ button. If you do not know the full name or don't know the proper spelling you can search by using a partial portion of their name. See the example below for how to enter a search using the % wild card search symbol. Click on "Go".

If the action is for an existing employee, click the "Employee" box to limit the search.



Now that you have searched and found the person you are performing a transaction on, select the EPAF that represents the personnel action you want to execute from the Approval Category drop down menu. Click on "Go".

Note: If the employee cannot be found you will not be able to perform any transaction at this time.

DSU Online se	rvices Not Selected	
Personal Information	Alumnia Overload Spring - Current Faculty/Staff, OVERSP	
	Overload - Continuing Education Non Credit, CONTOL	
Search	Adjunct Rehire, AJREHI Adjunct Rehire Non Credit Continuing Education, AJRECE	YEE MENU SITE MAP HELP EXIT
	Adjunct New Hire, AJNEWH	
New EPAF P	erson Adjunct New Hire Continuing Education, AJNEWC	After identifying an employee, click
	Update Labor Distribution - Academic Affairs, LABOR Update Labor Distribution - Non Academic Affairs, LABOR1	the Approval Category drop down
🛡 Enter an ID, sele		lect the Appendic menu to select the EPAF that
	Faculty Termination from DSU, FATERM	represents the desired personnel
+ - indicates a required f	ield. Salary and Title Change - Staff (Current Position), SALCHS	i setter and d
ID: 🙀 900044576	Salary and Title Change - Hourly (Current Position), SALCHH	
900044576	One Time Pay (Overload Faculty/Staff), 1PAYOL	
Query Date: MM/D	Campus Address Add/Change - Faculty, CAADCH	
Approval Category	Campus Address Addrenange - Stair, CAADST	•
	Not Selected	·
Go		
	EDAE Approver Summ	nary EPAF Originator Summary
	Return	n to EPAF Menu
DSU Online servi	Ces	
Personal Information /	Numni and Friends Student and Financial Aid Employee Services	
Search		MENU SITE MAP HELP EXIT
New EPAF Per	rson Selection	
The select The select of the s	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	L .	
ID: 🖕 900044576	Muriel D. Pagan 🔮 🔍	
Query Date: MM/DD/\		
Approval Category:	One Time Pay (Overload Faculty/Staff), 1PAYOL	<
Go		
🔺 There are no activ	e jobs based on the Query Date.	
All Jobs		
		501110
	EPAF Approver Summary EPA	F Originator Summary
	Return to EPAF	Menu

Selecting the Applicable Approval Category

Once you have selected a valid employee you need to select the correct processing approval category to apply. Here is a definition of all currently used EPAF at DSU.

#	CODE	EPAF APPROVAL CATEGORY	DESCRIPTION	CONTACT
1	D00001	Overload Pay	To pay a current DSU faculty/staff overload for teaching assignment during the fall and spring semesters – For Credit Courses only.	Human Resources
2	D00002	Overload Pay – Continuing Education	To pay a current DSU faculty/staff overload for teaching assignment during the fall and spring semesters – Courses taught through Continuing Education.	Human Resources
3	D00003	Adjunct Faculty Re-Appointment	To rehire an adjunct who has taught at DSU – For Credit Courses only.	Human Resources
4	D00004	Adjunct Faculty Re-Appointment – Continuing Education	To rehire an adjunct who has taught at DSU – Courses taught through Continuing Education.	Human Resources
5	D00040	Summer School Overload	To pay a current DSU faculty/staff overload for teaching assignment during the Summer School sessions – For Credit Courses only.	Human Resources
6	D00041	Summer School Overload – Continuing Education	To pay a current DSU faculty/staff overload for teaching assignment during the summer school sessions – Courses taught through Continuing Education.	Human Resources
7	D00042	Summer School Adjunct Re-Appointment	To rehire an adjunct who has taught at DSU – For Credit Courses for summer school only.	Human Resources
8	D00043	Summer School Adjunct Re-Appointment – Continuing Education	To rehire an adjunct who has taught at DSU – Courses taught through Continuing Education for summer school only.	Human Resources
9	D00044	Summer School Overload – Courses Taught During Over Sessions	To pay a current DSU faculty/staff overload for teaching assignment over <u>BOTH</u> summer school sessions – For Credit Courses only.	Human Resources
10	D00045	Summer School Overload – Continuing Education – Courses Over During Both Sessions	To pay a current DSU faculty/staff overload for teaching assignment during the summer school sessions – Courses taught through Continuing Education over <u>BOTH</u> summer school sessions.	Human Resources
11	D00046	Summer School Adjunct Re-Appointment – Courses Taught Over Both Sessions	To rehire an adjunct who has taught at DSU – For Credit Courses over <u>BOTH</u> summer school sessions.	Human Resources
12	D00047	Summer School Adjunct Re-Appointment – Continuing Education – Courses Taught Over Both Sessions	To rehire an adjunct who has taught at DSU – Courses taught through Continuing Education over <u>BOTH</u> summer school sessions.	Human Resources
13	D00007	One Time Payment – Extra Services (Non Academic Affairs)	To pay an employee additional pay for extra services performed outside their normal job duties.	Human Resources
14	D00008	One Time Payment – Extra Services (Academic Affairs)	To pay an employee additional pay for extra services performed outside their normal job duties.	Human Resources
15	D00009	Termination from DSU (Academic Affairs)	To end the employment of an employee who has resigned or been terminated.	Human Resources
16	D00010	Termination from DSU (Non Academic Affairs)	To end the employment of an employee who has resigned or been terminated.	Human Resources

DSU EPAFS

17	D00015	Job Labor Distribution Change (Academic Affairs)	To change the fund, org, and/or account to which an employee's salary is charged	Human Resources
18D00016Job Labor Distribution Change (Non Academic Affairs)To change the fund, org, and/or account to which an employee's salary is chargedHuman		Human Resources		
19	D00022	10022 Campus Address Change (Academic Affairs) To change the campus address of an employee. Huma		Human Resources
20	D00023	Campus Address Change (Non Academic Affairs)	To change the campus address of an employee.	Human Resources

How to Enter Routing Queue Manually

In this section you tell the system who will approve and apply the EPAF. To select a person click on the magnifying glass icon and select the appropriate approving manager for your department that is authoring this transaction. If they do not appear on this list, please contact your HR office for inclusion.

Some routing queues are pre-established and cannot be changed.

Mary Ruth Phillips in Payroll is the only applier.

Routing Queue

Approval Level	User Name		Required Action Remove
90 - (HR) Human Resources	Q LGIGER	Lisa Weeks Giger	Approve
99 - (SUPER) Superuser		Lisa Weeks Giger	Apply
5 - (DEPT) Director/Supervisor	▼ Q,		Not Selected
Not Selected			Not Selected
Not Selected	▼ Q		Not Selected
Not Selected	▼ Q,		Not Selected

How to Create a Default Routing Queue

The next section is setting up a default routing queue for your EPAFs. In this section you define/tell the system which personnel will approve and apply each EPAF in advance.

Once the EPAF is selected for a transaction, the routing queue will automatically populate with the pre define selections. To setup the default routing queue, click on the EPAF Originator Summary from the main EPAF Menu. Once at the summary page click on the Default Routing Queue blue link at the center of the screen above the EPAF transactions listing.

Personal Information	Alumni and Friends Studer	nt and Financial Aid [®] Employee Services
Search	Go	RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT
Electronic Per	sonnel Action Form	n
EPAE Approver Sum	many	
EPAF Originator Sum		
New EPAF		
EPAF Proxy Records	3	
Act as a Proxy		
RELEASE: 8.9		
SU Online servic		
ersonal Information		and Financial Aid Final area Derived
Search	Go	
bouron		RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT
	or Summory	
EPAF Originato	JI Summary	
urrent History		
anone motory		
-	r Name to access details of	the transaction, or select the link under Transaction to update the transaction.
Select the link under		the transaction, or select the link under Transaction to update the transaction.
Select the link under	All 🔺 Go	the transaction, or select the link under Transaction to update the transaction.
Select the link under		
Select the link under	All 🔺 Go	the transaction, or select the link under Transaction to update the transaction. New EPAF Default Routing Queue Search Superuser or Filter Transactions
Select the link under	All 🔺 Go	New tPAF Default Routing Queue Search Superuser or Filter Transactions
Select the link under	All 🔺 Go	
Select the link under	All 🔺 Go	New tPAF Default Routing Queue Search Superuser or Filter Transactions
Select the link under	All 🔺 Go	New tPAF Default Routing Queue Search Superuser or Filter Transactions
Select the link under Transaction Status: M Online services ratification and the services	All Go Waiting Go	New tPAF Default Routing Queue Search Superuser or Filter Transactions
Select the link under Transaction Status: M Online services rat Information Atumni and	All Go Waiting Go	New tPAF Default Routing Queue Search Superuser or Filter Transactions
Select the link under Transaction Status: Online services nat Information Atumni and h Gc	All Go Waiting - Friends [®] Student and Financial Aid	New LCAE Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu
Select the link under Transaction Status: Online services nat Information Atumni and h Gc	All Go Waiting - Friends [®] Student and Financial Aid	New LCAE Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu
Select the link under Transaction Status: Online services Ind Information Atumni and h Ga KF Default Routing	All Go Waiting C Friends [®] Student and Financial Ad Queue	New LCAE Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu
Select the link under Transaction Status. Transaction Status. The services The Information Atomniand The Category at the services The Default Routing The test an Approval Category at the services The Select and the select and the services The Select and	All Go Waiting Go Friends Student and Financial Aid Queue ind Go. Once the page refreshes, s	New Level, User ID and action.
Select the link under Transaction Status. Transaction Status. The services The Information Atomniand The Category at the services The Default Routing The test an Approval Category at the services The Select and the select and the services The Select and	All Go Waiting Go Friends Student and Financial Aid Queue ind Go. Once the page refreshes, s	New LOAF Default Routing Queue Sourch Superuser or Filter Transactions Return to EPAF Menu F compleyee derives RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT
Select the link under Transaction Status: Contine services Additionation Additionat	All Go Waiting Go Friends Student and Financial Aid Queue ind Go. Once the page refreshes, s	New Level, User ID and action.
Select the link under Transaction Status: Online services Internation Automated h Get KF Default Routing lect an Approval Category Not Selecte wal Category Not Selecte wal Level	All Go Waiting Go Go Friends [®] Student and Financial Aid O Queue Ind Go. Once the page refreshes, s ed	New LPAF Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu Imployee derives RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT select the Approval Level, User ID and action. Imployee Converse Imployee Converse
Select the link under Transaction Status: Online services Ind Information Atumn and h Gat F Default Routing lect an Approval Category Not Selecte val Queue val Queue val Level ielected	All Go Waiting Co Go Friends Student and Financial Aid 0 Queue ind Go. Once the page refreshes, s ad	New LPAF Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu Imployee derives RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT select the Approval Level, User ID and action. Imployee Converse Imployee Converse
Select the link under Transaction Status:	All Go Waiting Go Go Go Go Gueue Ind Go. Once the page refreshes, s ad	New LPAF Default Routing Queue Search Superuser or Filter Transactions Return to EPAF Menu Imployee derives RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT select the Approval Level, User ID and action. Imployee Converse Imployee Converse Imployee Converse RETURN TO EMPLOYEE MENU SITE MAP HELP EXIT Select the Approval Level, User ID and action. Imployee Converse Imployee Converse

Once at the Default Routing Queue screen, click the drop down menu and choose an EPAF to predefine the Approval Queue.

EPAF Default Routing Queue

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

Approval Category:	Not Selected	Go	
	Not Selected		
	Overload Spring - Current Faculty/Staff, OVERSP		
Approval Queue	Overload - Continuing Education Non Credit, CONTOL		
Approval Level	Adjunct Rehire, AJREHI		Required Action
Not Selected	Adjunct Rehire Non Credit Continuing Education, AJRECE Adjunct New Hire, AJNEWH		Not Selected ·
Not Selected	Adjunct New Hire Continuing Education, AJNEWC		Not Selected
Not Selected	Update Labor Distribution - Academic Affairs, LABOR		Not Selected -
Not Selected	Employee Termination from DSU (Staff/Hourly), EMTERM		Not Selected
Save and Add New F	Faculty Termination from DSU, FATERM Salary and Title Change - Staff (Current Position), SALCHS Salary and Title Change - Hourly (Current Position), SALCHH New Employee Biographical and Permanent Address, AEMBIO One Time Pay (Overload Faculty/Staff), 1PAYOL Campus Address Add/Change - Faculty, CAADCH Campus Address Add/Change - Staff, CAADST	: Originator Summary etum to EPAF Menu	

In the Approval Level column, click the drop down menu to choose the level and category for each approval need to process the action completely.

Once you have identified the level and category of the Approval Level needed, **click the magnifying class** \bigcirc **to select the corresponding User Name for each approval level** identified and the Required Action for each User Name.

NOTE: The **system may mandate certain default approvers and appliers for all transactions**, such as Human Resource Approver, Human Resource Applier and Budget Approver.

EPAF Default Routing Queue

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

Approval Category: Summer School Overload, D00040 v Go

Approval Queue			
Approval Level	User Name		Required Action Rer
10 - (CHAIR) Chair	~ Q		Approve 🗸 🗆
15 - (DEAN) Dean	~ Q.		Approve v
39 - (ACAFF1) Academic Affairs (Hayley)	V A HMURRELL	Hayley H Murrell	Approve v
40 - (ACDAFF) Academic Affairs	V CBALLARD	Cheryl M Ballard	Approve v
45 - (PROVOS) Provost of Academic Affairs	V CMCADAMS	Charles Alan McAdams	Approve v
50 - (HRFYI) HR FYI	V SMPHILLIPS	Samantha Myers Phillips	FYI v
65 - (BUDGET) Budget Office	V GINDSEY	Beverly Coons Lindsey	Approve v
70 - (PAYROL) Payroll FYI (Monthly)	V Q MPHILLIPS	Mary Ruth Phillips	FYI v
75 - (HRDIR) Human Resource Director	V 🔍 LGIGER	Lisa Weeks Giger	Approve v
99 - (SUPER) Superuser	V Q MPHILLIPS	Mary Ruth Phillips	Apply v
Not Selected	~ Q.		Not Selected v
Not Selected	~ Q		Not Selected v
Not Selected	↓ Search		Not Selected v
Not Selected	~ Q.		Not Selected v

Save and Add New Rows

How to Review the History of Originators Transactions and Their Statuses

From the first web page you enter you will see the links to navigate. Click on the link labeled "EPAF Originator Summary" - see sample below.

New EPAF Person Selection	
Enter an ID, select the link to search for an	n ID, or generate an ID. Enter the Query Date and select the Approval Category. Select Go
∗ - indicates a required field.	
ID: 🖕	å Q
Query Date: MM/DD/YYYY 10/17/2014	
Approval Category: 🞍 Not Selected	•
Go	
	EPAF Approver Summary EPAF Originator Summary
	Return to EPAF Menu

You may look at your EPAF by transaction status by clicking on the Originator Summary link. From this point you can see their status. You can look at any of the details for any given employee in the list.

	New	EPAF Default Routing Queue Search Sup	eruser or Filter Trans	actions		
		Return to EPAF Menu				
▲ ID ▼	A Transaction ▼	A Type of Change ▼	A Submitted Date ▼	▲ Effective Date ▼	▲ Transaction Status ▼	Links
900114402	<u>19</u>	Update Labor Distribution - Academic Affairs		Oct 01, 2014	Waiting	Commer
	<u>85</u>	One Time Pay (Overload Faculty/Staff)		Oct 01, 2014	Waiting	Commer
	1	1				
	900114402	 ↓ ID ↓ Transaction 900114402 19 	Return to EPAF Menu Transaction Type of Change 900114402 19 Update Labor Distribution - Academic Affairs 0one Time Pay (Overload Faculty/Staff)	ID Transaction Type of Change Submitted Date 900114402 19 Update Labor Distribution - Academic Affairs One Time Pay (Overload Faculty/Staff) One Time Pay (Overload Faculty/Staff)	ID	Relum to EPAF Menu ID Transaction Type of Change Submitted Date Effective Date Transaction Status 900114402 19 Update Labor Distribution - Academic Affairs Oct 01, 2014 Waiting 0one Time Pay (Overload Faculty/Staff) Oct 01, 2014 Waiting

If you click on the person's name you will see the details entered. Note that you can void or delete this transaction. Delete will remove the process from the system and will not be processed. If you void it, the transaction detail is kept but will not be processed.

Return to EPAF Menu

If you need to update this transaction you can do so by clicking the "Update" button. Once you update the transaction you must save and Submit again to process your changes. NOTE: this can be done until the transaction is approved. After that, only the approver can return the EPAF to you for correction and then you can update and resubmit.

EPAF Preview



Labor Distribution - Update if Needed, 000003-00 Assistant Professor of Art

COA In	dex Fund	Organizati	on Accoun	t Program Activ	vity Location	Project Cost	Percent	Encumbrance Override End Da
1	10	3006	61200	0101			100.00	
New								
		0/01/2014						
COAIn					ity Location	Project Cost	Percent	Encumbrance Override End Da
1	10	0305	61200	0101			.00	
Routing	Queue							
-	al Level	Name		Required A	ction Queue St	atus Action Da	te	
Approva	-	Q0 Liea Wool	s Giaer. LG	IGER Approve	In the Que	ue		
	Resources,	JU LIJA WEER	5,					

Created: Oct 06, 2014 Lisa Weeks Giger

How to Process an Overload Pay and Overload Pay (Continuing Education)

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to process an overload for current faculty/staff employees and for adjuncts, which already have an active job for the semester. The steps below should be followed:

- 1. Enter the employee's 900# or click on the ^Q magnifying glass to search for an employee's 900#.
- 2. The query date will default to today's date. Change the query date to:
 - Fall Semester: 09/01/2018 or 09/01/20___
 - o Spring Semester: 02/01/2018 or 02/01/20___
- 3. Select Overload Pay or Overload Pay (Continuing Education) from the drop down approval category box.

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DATE YOU WANT THE TRANSACTION TO TAKE PLACE. IF IT IS NOT SET TO THE CORRECT DATE (LISTED ABOVE), IT WILL CAUSE AN ERROR AND YOU WILL HAVE TO RESTART THE EPAF.

DSUO	nline servic	es			-	-		
Personal	Information A	umni and Friends Studer	it and Financial A	d Employee Servi	ces			
Search		Go		RETURI	N TO EMPLOYEE	EMENU S	SITE MAP HELP EXIT	
New	EPAF Pers	son Selection						
🗮 Enter	an ID, select t	he link to search for an ID	, or generate an I	D. Enter the Query	/ Date and selec	ct the App	roval Category. Select Go.	
≭ - indicat	es a required field							
ID: 🗯 90	0114402	Rylee Cassandra Donovar		Ç				
	ate: MM/DD/Y		0001			<u></u>	After identifying an employee Approval Category drop do the EPAF for Overload Pay	own menu to select
Go							Pay (Continuing Education	– Non Credit).
	e Job Assign							
	Position Suffix 000003 00	Assistant Professor of Art	V	nization Start Date lucation Aug 15, 2		ast Paid L	Active	
All Jobs	. ←					_		
						_	The Employee Job Assignr active positions. By clickin button, it will display all cu	g the All Jobs
							jobs.	

4. Click on "Go" to begin the Overload Pay and/or Overload Pay (Continuing Education - Non Credit) EPAF.

5. Enter the correct position numbers in the format indicated below and click on "GO". If a position number has already been assigned to the employee, select the radial dial at the end of the line and click on "GO". It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.

Position #:	Suffix #:	Description
000458	00	Overloads paid for credit hour courses.
004025	00	Overloads paid by other funds (not grants). The fund #s usually start with 108.
004030	00	Overloads paid by grant funding. The fund #s usually start with 3.
000478	00	Overloads paid by Continuing Education. The section numbers will start with a "c". Example: Section c21

	h	Go		RETURN TO EN	MPLOYEE MENU	SITE MAP H	ELP EXIT		
Nev	v EPAF Job Sele	ction							
👎 En	ter or search for a new r	osition number and	enter the suffix	or select the link under Tit	le				
ID:		issandra Donovan, 9							
			00114402						
Quer	v Date: Feb 01 2	2015							
	y Date: Feb 01, 2 oval Category: Overload								
Appro	oval Category: Overload	Pay, D00001							
Appro		Pay, D00001		Time Sheet Organization	Start Date	End Date Last	Paid Date Sta	itus <mark>Sele</mark> ct	
Appro	oval Category: Overload oad/Add Job, OVERSP	Pay, D00001		Time Sheet Organization 3001, General Instruction		and Date Last	Paid Date Sta	itus Select	

6. View Employee Class:

- o This section allows the originator to view the current employee's employment information.
- Employment Status must equal (A) Active.
- o If employment status is listed something else other than Active, do not use this EPAF.
- Listed below are the definitions of the Employee Class Code
- These fields are not able to be changed.

Employee Class Description	Employee Class Definition	Payroll ID
F1, Faculty 9/12	Faculty employee employed for 9 months and paid over 12 months	M1 payroll
F2, Faculty 9/9	Faculty employee employed for 9 months and paid over 9 months	M2 payroll
F4, Faculty 12/12	Faculty employee employed for 12 months and paid over 12 months	M1 payroll
S1, Full Time Staff	Staff employee employed for 12 months and paid over 12 months	M1 payroll
F3, Faculty PT < 9 months	Adjunct faculty	Do not used this EPAF

* - indicates a required field.

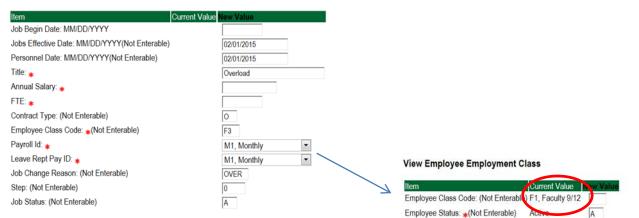
View Employee Employment Class

Item	Current Value	New Value
Employee Class Code: (Not Enterable)	F1, Faculty 9/12	←
Employee Status: *(Not Enterable)	Active	A

7. Enter Overload Pay Information

Field	Statement/Action	Action/Example
Job Begin Date:	If statement below says "Last Paid Date:"then	Leave field blank
	Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 Overload ENG 10 Last Paid Date: Nay 31, 2014	
	Item Current Value New Value	
	Job Begin Date: MM/DD/YYYY	1
	If statement below says "PT Instructor/Gen Acad Instr",then	Enter: (enter corresponding
	Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 PT Instructor / Gen Acad Instr	year)
	Item Current Value New Value Job Begin Date: MM/DD/YYYY	09/01/20 for Fall Semester
		02/01/20 for Spring Semester
Job Effective Date:	Field cannot be changed. Information is defaulted.	
Job Personnel Date:	Field cannot be changed. Information is defaulted.	
Title:	Enter the course information for the overload that is being paid.	Example:
		Overload ENG 101
Annual Salary:	Total amount to be paid for course overloads	3000.00
FTE:	FTE for overload is calculated as follows:	Enter the number FTE for the number of
	.25 = 1 course overload .75 = 3 course overload .50 = 2 course overload 1.00 = 4 course overload	course overloads:
	To figure FTE divide the amount to be paid by $12,000$ Example: $$300/$12,000 = .025$	Example: .25
Contract Type	Field cannot be changed. Information is defaulted.	
Employee Class Code	Field cannot be changed. Information is defaulted.	
Payroll ID	Payroll ID will default to M1. Field can be change. If the employee class under the "View Employee Employment Class" is F1, F4, or S1then	Payroll ID M1 should remain defaulted.
	If the employee class under the "View Employee Employment Class" is F2then	Use the drop down box to change to M2.
	View Employee Employment Class	
	Item Current Value New Value Employee Class Code: (Not Enteratie) F1, Faculty 9/12	
	Employee Status: *(Not Enterable)	
Leave Rept Pay ID	The Leave Report Pay ID should match the Payroll ID above.	Match Leave Rept Pay ID to Payroll ID (either M1 or M2)
Job Change Reason	Field cannot be changed. Information is defaulted.	
Step	Field cannot be changed. Information is defaulted.	
Job Status	Field cannot be changed. Information is defaulted.	

Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 PT Instructor / Gen Acad Instr



8. Update Factor, Pays, and Hours

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Update Factors, Pays, and Hours, 000458-00 Overload ENG 101, Last Paid Date: May 31, 2014

Item	Current Value	New Value		
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		02/01/2015		
Factor: (Not Enterable)		4		No Action Needed
Pays: (Not Enterable)		4	-	
Hours per Pay: (Not Enterable)		84	•	

9. Terminate Employee Job

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Terminate Employee Job, 000458-00 Overload ENG 101, Last Paid Date: May 31, 2014

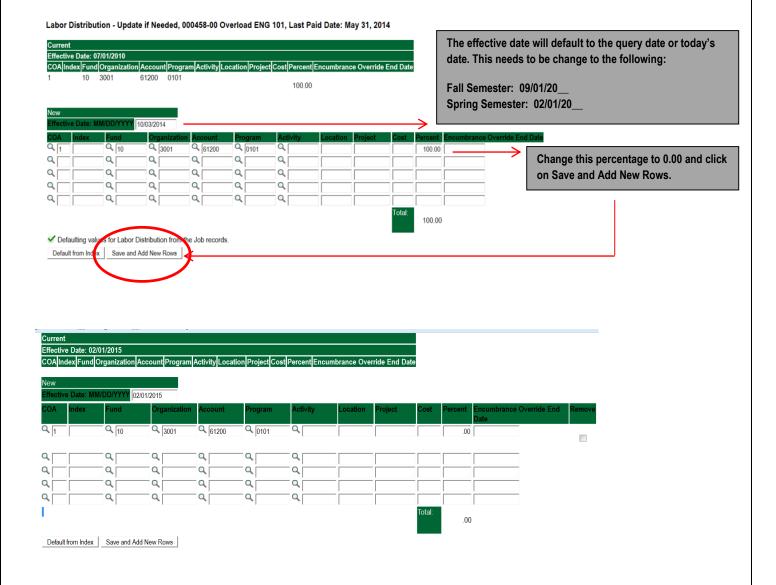


10. Labor Distribution – Update if Needed

- o In the "CURRENT" section the current labor codes and the effective date of the last change will default into the form.
- o In the "NEW" section add new rows or make changes to the existing rows.
- Changes to the accounting information will be <u>LIMITED</u>. The correct accounting information should default in the field according to the position number being used.
- The fund, organization, account, and program codes will <u>NOT</u> need to be change unless payment is being charged by grant or other funds.
- EFFECTIVE DATE: The effective date should equal either: 09/01/20_ (Fall) or 02/01/20_ (Spring) depending on the semester.
- o Apply the appropriate changes to the field if necessary.

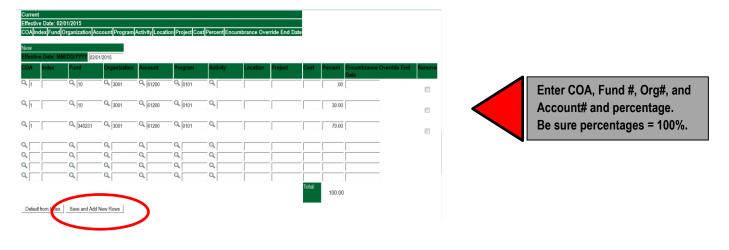
Steps to change Labor Distributions

1. Change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.



- 2. Enter the new accounting information. The following must be entered for each line.
 - a. COA = enter 1.
 - b. Fund No.
 - c. Organization No.
 - d. Account No. = 61200
 - e. Percentage = totals must equal 100%. See sample below

Click to "Save and Add New Rows"



- 3. Click on the box under the "Remove" Column to remove the old accounting information. The percentage should be set 0.00%.
- 4. Click on Save and Add New Rows. The old accounting information should be removed.

Index	Fund	01/2015 Organizatior	Account	Program	Activity	Location	Project	Cost	Percent E	Encumbrance Override End Date	Remove	Click the remove button on
	Q 10	Q 3001	61200	Q 0101	Q				.00			the line that has 0.00%
	Q 10	Q 3001	Q 61200	Q 0101	٩				30.00			entered. Then click on "Save
	Q 340231	Q 3001	Q 61200	Q 0101	٩				70.00			and Add New Rows.
	٩,	٩,	Q	٩	Q.							
								-				
	Q	Q	Q	Q	٩			Total:				
								iUtal.	100.00			

Update Labor D Current Effective Date: 02 COA Index Fund	2/01/2015					umbrance Ove	rride End Dat	e			
New Effective Date: M	M/DD/YYYY 02/	01/2015									
COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
Q 1	Q 10	Q 3001	Q 61200	Q 0101	۹ 🛛				30.00		
Q 1	340231	Q 3001	61200	Q 0101	٩				70.00		
		Q Q Q Q	Q Q Q Q								
Default from Index	Save and Add	New Rows						Total:	100.00		

11. Routing Queue

- In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- For Overloads, all EPAFs must have a Chair and Dean level approval.
- For Grants, <u>all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office</u>. Other approval levels will default.
- For Continuing Education courses, add <u>Dean, Graduate and Continuing Education and Continuing Education (Marilyn</u> <u>Read).</u>

Approval Queue				
Approval Level	User Name		Required Action	Re
10 - (CHAIR) Chair	~ Q		Approve	~
15 - (DEAN) Dean	~ Q		Approve	v
39 - (ACAFF1) Academic Affairs (Hayley)	V A HMURRELL	Hayley H Murrell	Approve	•
40 - (ACDAFF) Academic Affairs	✓ ^Q CBALLARD	Cheryl M Ballard	Approve	•
45 - (PROVOS) Provost of Academic Affairs	V CMCADAMS	Charles Alan McAdams	Approve	• 🗆
50 - (HRFYI) HR FYI	✓ Q SMPHILLIPS	Samantha Myers Phillips	FYI	•
55 - (BUDGET) Budget Office	V Q BLINDSEY	Beverly Coons Lindsey	Approve	✓
70 - (PAYROL) Payroll FYI (Monthly)	V MPHILLIPS	Mary Ruth Phillips	FYI	•
75 - (HRDIR) Human Resource Director	✓ Q LGIGER	Lisa Weeks Giger	Approve	•
99 - (SUPER) Superuser	V Q MPHILLIPS	Mary Ruth Phillips	Apply	~
Not Selected	~ Q.		Not Selected	~
Not Selected	~ Q.		Not Selected	¥
lot Selected	↓ Search		Not Selected	¥
Not Selected	~ Q.		Not Selected	~

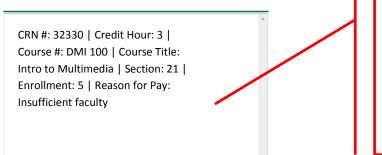
Save and Add New Rows

12. Click on the "Save and Add New Rows".

13. Comments

- o In the "Comments" section, enter comments for the approvers with an explanation for the action.
- In the "Comment" section, also enter the following for overload information:
 - CRN #:
 - Credit Hour:
 - Course Number:
 - Course Title:
 - Section:
 - Enrollment:
 - Reason for Overload:

Comment



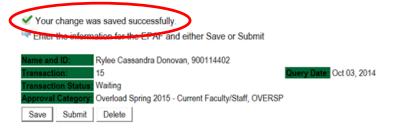
Enter additional information here.

Enter: CRN #: | Credit Hour: | Course #: | Course Title | Section: | Enrollment: | Reason for Pay: include whether the course is offered through Continuing Education.

14. Save EPAF

- Hit the "Save" Button at the bottom of the form.
- Return to the top of the form.
- The message should display "Your change was saved successfully."
- o Check your date entry

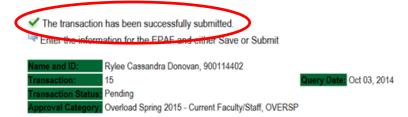
Electronic Personnel Action Form



15. Submit EPAF

- Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
- The EPAF automatically routes to the approvers in the order of their approval levels.

Electronic Personnel Action Form



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Errors and Warning Messages	Errors	and	Warning	Messages
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Туре	Message Type	Description
Add Employee Job	WARNING	*WARNING* This employee is terminated on the Employee Form.
Add Employee Job	WARNING	*WARNING* The Employee's Term Date and Reason should be removed from PEAEMPL.
Add Employee Job	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
Update Factors, Pays and Hours	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
- indicator a required field		

* - indicates a required field.

Delete

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

How to Process an Adjunct Rehire and Adjunct Rehire (Continuing Education)

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to rehire an adjunct. The steps below should be followed:

- 1. Enter the employee's 900# or click on the \bigcirc magnifying glass to search for an employee's 900#.
- 2. The query date will default to today's date. Change the query date to:
 - Fall Semester: 09/01/2018 or 09/01/20___
 - o Spring Semester: 02/01/2018 or 02/01/20___
- 3. Select Adjunct Rehire or Adjunct Rehire (Continuing Education) from the drop down approval category box.

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DATE YOU WANT THE TRANSACTION TO TAKE PLACE. IF IT IS NOT SET TO THE CORRECT DATE (LISTED ABOVE), IT WILL CAUSE AN ERROR AND YOU WILL HAVE TO RESTART THE EPAF.

New EPAF Person Selection

Renter 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: 900114404 Oliva Caden Silver 🗳 🔍		
Query Date: MM/DD/YYYC 02/01/2015 Approval Category: Adjunct Faculty Re-Appointment, D00003 Go Go	• ←	After identifying an employee, click the Approval Category drop down menu to select the EPAF for Adjunct Rehire and/or Adjunct Rehire (Continuing Education – Non Credit).
Employee Job Assignments Type Position Suffix Title Time Sheet Organization Start Date End Date It Secondary 000478 00 Adjunct Instr Teach Ed 0387, Social Science Feb 01, 2015 May 31, 2015	ast Paid Date Status Active	
All Jobs	active pos	eyee Job Assignments show all itions. By clicking the All Jobs vill display all current and previous

- 4. Click on "Go" to begin the Adjunct Rehire and/or Adjunct Rehire (Continuing Education Non Credit) EPAF.
- 5. Click on the button "All Jobs".
- Select the position in which to reactivate by clicking on the radial dial at the end of the row. The position to reactivate will usually be position 000458 for credit courses and 000478 for Continuing Education – Non Credit courses. The position to be reactivated will usually be the primary type.
- If the employee does not have a job with the correct position number, then enter the position number in the format indicated below and click on "GO". It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.

Position #:	Suffix #:	Description
000458	00	Overloads paid for credit hour courses.
004025	00	Overloads paid by other funds (not grants). The fund #s usually start with 108.
004030	00	Overloads paid by grant funding. The fund #s usually start with 3.
000478	00	Overloads paid by Continuing Education. The section numbers will start with a "c".
		Example: Section c21

To Add a New Position - Screen Shot

New EPAF Job Selection

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



Add Employee Job, ADDJOB

Search	Туре	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job	000458	00	PT Instructor / Gen Acad Instr	3001, General Instruction					-
										۲
	Secondary	000478	00	Adjunct Instr Teach Ed	0387, Social Science	Feb 01, 2015	May 31, 2015		Active	
										0
All Jol Next /	bs Approval Ty	e Go)							

To Re-activate a Position – Screen Shot

New EPAF Job Selection

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



Add Employee Job, ADDJOB

		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	_							
Search	Туре	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Selec
Q	New Job									
		1								O
	Primary	000458	00	Adjunct Instr Social Scie	0387, Social Science	Sep 01, 2014	Dec 31, 2014		Active	
										•
1										

Next Approval Type Go

To Activate a Grant Position - Screen Shot

New EPAF Job Selection

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

ID:	Oliva Caden Silver, 900114404
Query Date:	Oct 09, 2014
Approval Category:	Adjunct Rehire***, AJREHI

Add Employee Job, ADDJOB

Search	Туре	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Selec	4
Q	New Job	004030	00	Adjunct Instructors	41211, Other General Institutional					6	
	Primary	000458	00	Adjunct Instr Social Scie	0387, Social Science	Sep 01, 2014	Dec 31, 2014		Active		
										0	
	Secondary	000478	00	Adjunct Instr Teach Ed	0387, Social Science	Feb 01, 2015	May 31, 2015		Active		-
										0	
All Jo	obs	1		1		1	1		1		_
Next	Approval Typ	e Go									

Enter Adjunct Employment Record – See table below for instructions.

Field	Statement/Action	Action/Example
Home Organization	Change if needed. A change is usually not needed	0387
Distribution Org	Change if needed. If Home organization is change, then distribution	
	org must match home org.	
Current Hire Date	Field cannot be changed. Information is defaulted.	No action needed
Employee Status	Field cannot be changed. Information is defaulted.	No action needed
Employee Class Code	Enter the following if needed: (Usually a change is not needed)	
	F3=adjunct employee	F3
	RT=reemployment of PERS retiree	
Home COAS	Field cannot be changed. Information is defaulted.	No action needed
Term Reason Code:	Field cannot be changed. Information is defaulted.	No action needed
Terminate Date:	Field cannot be changed. Information is defaulted.	No action needed
Last Work Date:	Field cannot be changed. Information is defaulted.	No action needed

An * is a required field.

Adjunct Employment Record

Item	Current Value	New Value
Home Organization:	0387, Social Science	Q
Distribution Orgn:	0387, Social Science	Q,
Current Hire Date: MM/DD/YYYY(Not Enterable)	09/01/2014	
Employee Status: *(Not Enterable)	Terminated	A
Employee Class Code:	F3, Faculty P/T < 9 Months	Q
Home COAS: *(Not Enterable)	1	1
Term Reason Code: * (Not Enterable)	JE, Job ends	JE
Termination Date: MM/DD/YYYY*(Not Enterable)) 12/31/2014	05/31/2015
Last Work Date: MM/DD/YYYY*(Not Enterable)		-

8. Add Employee Job – See table below for instructions

Field	Statement/Action	Action/Example
Job Begin Date:	In the Current Value Column, if the current information is population, then	Leave field blank
-	Add Employee Job, 000458-00 Adjunct Instr Social Scie	
	Item Current Value few Value Job Begin Date: MM/DD/YYYY(Not Enterable 09/01/2014	
	Jobs Effective Date: MM/DD/YYYY(Not Enterable) 09/01/2014 (02/01/2015	
	Personnel Date: MM/DD/YYYY(Not Enterable) 09/01/2014 02/01/2015	
	Contract Type: Primary Primary	
	Title: * Adjunct Instr Social Scie	
	FTE: *	
	Employee Class Code: *(Not Enterable) F3, Faculty P/T < 9 Months F3	
	Payroll Id: *(Not Enterable) M2 M2	
	Leave Rept Pay ID: *(Not Enterable) M2 M2	
	Job Change Reason: (Not Enterable) ADJUN ADJUN Step: (Not Enterable) 0 0	
	Job Status: (Not Enterable) Active A	
		Enter:
	To Add Position Number:	(enter corresponding
	If Adjunct has not been employed in a position (the Current Value Column will be	year)
	blank), then enter the following in the Job Begin Date Field:	<i>j</i> • • • · <i>j</i>
	Fall Samactor: 09/01/20	09/01/20 for Fall
	Fall Semester: 09/01/20 Spring Semester: 02/01/20	Semester
	Spring Sentester. 02/01/20	
		02/01/20 for Spring
	Add Employee Job, 004030-00 Adjunct Instructors	Semester
	Item Current Value	
	Job Begin Date: MM/DD/YYYY 02/01/2015	
	Jobs Effective Date: MM/DD/YYYY(Not Enterable) 02/01/2015	
	Personnel Date: MM/DD/YYYY(Not Enterable) 02/01/2015	
	Contract Type: Secondary	
	Title: * Adjunct Instr Teach Ed	
	Annual Salary: *	
	FTE: * 25	
	Employee Class Code: *(Not Enterable) F3 Payroll Id: *(Not Enterable) M2	
	Leave Rept Pay ID: *(Not Enterable)	
	Job Change Reason: (Not Enterable)	
	Step: (Not Enterable)	
	Job Status: (Not Enterable)	
ob Effective Date:	Field cannot be changed. Information is defaulted.	
lob Personnel	Field cannot be changed. Information is defaulted.	
Date:		
Contract Type:	Field is defaulted to primary, If error occurs then change contract type to Secondary.	
Title:	Enter title as: Adjunct Instructor in Title may have to be abbreviated	Adj Instr Social Sci
Annual Salary:	Total amount to be paid for course overloads	3000.00
FTE:	FTE for overload is calculated as follows:	Enter the number
		FTE for the number
	.25 = 1 course overload .75 = 3 course overload	of course overloads
	.50 = 2 course overload $1.00 = 4$ course overload	
-	To figure FTE divide the amount to be paid by 12,000 Example: \$300/\$12,000 = .025	Example: .25
Contract Type	Field cannot be changed. Information is defaulted.	
Employee Class	Field cannot be changed. Information is defaulted.	
Code		
Payroll ID	Field cannot be changed. Information is defaulted.	
Leave Rept Pay ID	Field cannot be changed. Information is defaulted.	Match Leave Rept
		Pay ID to Payroll ID
Job Change	Field cannot be changed. Information is defaulted.	
Reason	Pield serves the share of the serve the factor of the literation o	
Step Job Status	Field cannot be changed. Information is defaulted. Field cannot be changed. Information is defaulted.	

Add Employee Job, 000458-00 Adjunct Instr Social Scie

Item	Current Value	New Value
Job Begin Date: MM/DD/YYYY(Not Enterable)	09/01/2014	
Jobs Effective Date: MM/DD/YYYY(Not Enterable) 09/01/2014	02/01/2015
Personnel Date: MM/DD/YYYY(Not Enterable)	09/01/2014	02/01/2015
Contract Type:	Primary	Primary <
Title: \star	Adjunct Instr Social Scie	Adjunct Instr Social Sci
Annual Salary: 🜟	3000	3000.00
FTE: \star	.125	.125
Employee Class Code: *(Not Enterable)	F3, Faculty P/T < 9 Months	F3
Payroll Id: *(Not Enterable)	M2	M2
Leave Rept Pay ID: *(Not Enterable)	M2	M2
Job Change Reason: (Not Enterable)	ADJUN	ADJUN
Step: (Not Enterable)	0	0
Job Status: (Not Enterable)	Active	A

9. Update Factors, Pays, and Hours - see table below for instructions

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Update Factors, Pays, and Hours,

Item	Current Value New Value	
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	02/01/2015	
Factor: (Not Enterable)	4	No Action Needed
Pays: (Not Enterable)	4	No Action Needed
Hours per Pay: (Not Enterable)	84	

10. Terminate Employee Job

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Terminate Employee Job, 004030-00 Adjunct Instructors

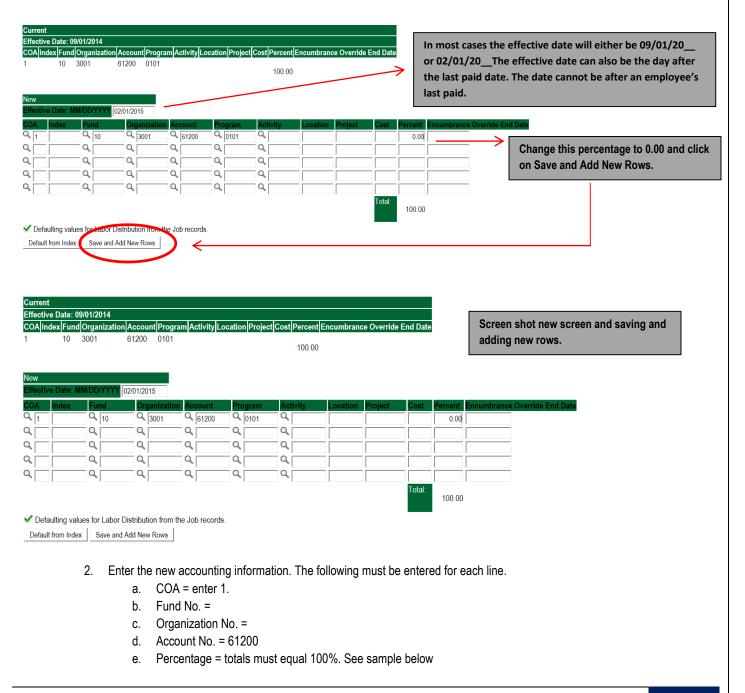
Item	Current Value New Value	
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)	05/31/2015	
Job Status: \star (Not Enterable)	T	
Job Change Reason: *(Not Enterable)	JBEND	

11. Labor Distribution - Update if Needed

- a. The current position's labor distribution information is displayed. The "Labor Distribution in effect as of entered effective date" is the most current effective date for this position number.
- a. In the "NEW" section add new rows or make changes to the existing rows. If no changes are needed, then take no action.
- b. EFFECTIVE DATE: The effective date in most cases is either 09/01/20__ or 02/01/20__.
- c. Apply the appropriate changes to the field if necessary.
- d. Changes to the accounting information will be <u>LIMITED</u>. The correct accounting information should default in the field according to the position number being used.
- e. The fund, organization, account, and program codes will <u>NOT</u> need to be change unless payment is being charged by grant or other funds.

Steps to change Labor Distributions

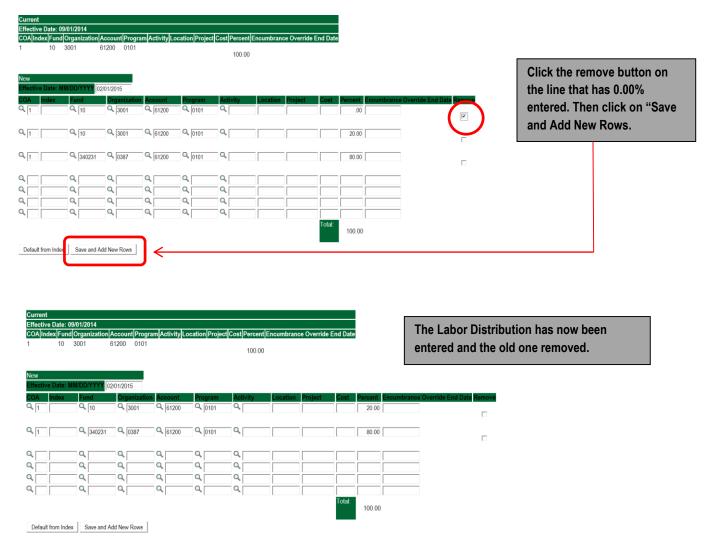
1. Change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.



Click to "Save and Add New Rows"

ffective Date	: 09/01/2014 Ind Organization	Account Proc		cation Project	t Cost Percent	Encumbrance	e Override F	nd Date					
		61200 0101			100.00								
ew ifective Date	: MM/DD/YYYY	2/01/2015											
OA Index	Fund	Organizati	Account	Program	Activity	Location	Project	Cost	Percent Encum	rance Override E	Ind Date Re	move	
	~ 10	~ [3001	- 01200						.00				Enter COA, Fund #, Org#,
1	Q 10	Q 3001	Q 61200	Q 0101	٩,				20.00				Account# and Percentage.
×۱	Q 340231	Q 0387	61200	Q 0101					00.00				Be sure percentages = 100%.
	~ 340231	~ 0387	~ 01200	~ 10101					80.00				
	Q	۹ 🗖	Q	٩,	٩								
		9	_ Q	Q									
		9	- Q	Q	_ Q				i i i i i i i i i i i i i i i i i i i				
		Q	- <	- Q	- Q					_			
11	I							Total:	100.00				

- 3. Click on the box under the "Remove" Column to remove the old accounting information. The percentage should be set 0.00%.
- 4. Click on Save and Add New Rows. The old accounting information should be removed.



12. Routing Queue

- In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- o For Adjunct Rehires, all EPAFs must have a Chair and Dean level approval. Other approval levels will default.
- For Grants, <u>all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office</u>. Other approval levels will default.
- For Continuing Education courses, add <u>Dean, Graduate and Continuing Education and Continuing Education (Marilyn</u> <u>Read).</u>

Approval Queue				
Approval Level	User Name		Required Action	Remov
10 - (CHAIR) Chair	~ Q		Approve	• 🗆
15 - (DEAN) Dean	~ Q.		Approve	~
39 - (ACAFF1) Academic Affairs (Hayley)	V A HMURRELL	Hayley H Murrell	Approve	~
40 - (ACDAFF) Academic Affairs	V CBALLARD	Cheryl M Ballard	Approve	~
45 - (PROVOS) Provost of Academic Affairs	V CMCADAMS	Charles Alan McAdams	Approve	~
50 - (HRFYI) HR FYI	V SMPHILLIPS	Samantha Myers Phillips	FYI	• 🗆
65 - (BUDGET) Budget Office	V Q BLINDSEY	Beverly Coons Lindsey	Approve	• 🗆
70 - (PAYROL) Payroll FYI (Monthly)	V MPHILLIPS	Mary Ruth Phillips	FYI	~
75 - (HRDIR) Human Resource Director	V LGIGER	Lisa Weeks Giger	Approve	~
99 - (SUPER) Superuser	V MPHILLIPS	Mary Ruth Phillips	Apply	• 🗆
Not Selected	~ Q.		Not Selected	~
Not Selected	~ Q.		Not Selected	~
Not Selected	V Search		Not Selected	~
Not Selected	~ 9.		Not Selected	~

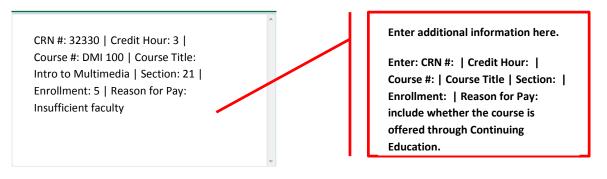
Save and Add New Rows

13. Click on the "Save and Add New Rows".

14. Comments

- In the "Comments" section, enter comments for the approvers with an explanation for the action.
- o In the "Comment" section, also enter the following for overload information:
 - CRN #:
 - Credit Hour:
 - Course Number:
 - Course Title:
 - Section:
 - Enrollment:
 - Reason for Overload:

Comment



15. Save EPAF

- Hit the "Save" Button at the bottom of the form.
- Return to the top of the form.
- The message should display "Your change was saved successfully."
- Check your date entry

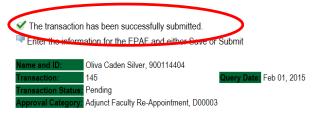
Electronic Personnel Action Form



16. Submit EPAF

- o Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
- o The EPAF automatically routes to the approvers in the order of their approval levels.

Electronic Personnel Action Form



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Errors and Warning Messages

Туре	Message Type	Description
Add Employee Job	WARNING	*WARNING* This employee is terminated on the Employee Form.
Add Employee Job	WARNING	*WARNING* The Employee's Term Date and Reason should be removed from PEAEMPL.
Add Employee Job	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
Update Factors, Pays and Hours	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.

* - indicates a required field.

Delete

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

How to Process:

Summer School Overload Pay Summer School Overload Pay (Continuing Education) Summer School Overload Pay – Course Taught Over Both Sessions Summer School Overload Pay (Continuing Education) – Course Taught Over Both Sessions

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to process an overload for current faculty/staff employees and adjuncts, which already have an active job for the semester. The steps below should be followed:

- Enter the employee's 900# or click on the ^Q magnifying glass to search for an employee's 900#.
- The query date will default to today's date. Change the query date to:
 - a. Summer School Session I: 06/01/2018 or 06/01/20___
 - b. Summer School Session II: 07/01/2018 or 07/01/20_
- Select from the drop down approval category box
 - Summer School Overload Pay
 - Summer School Overload Pay (Continuing Education)
 - Summer School Overload Pay Course Offered Over Both Sessions
 - Summer School Overload Pay Continuing Education Course Offered Over Both Sessions

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DATE YOU WANT THE TRANSACTION TO TAKE PLACE. IF IT IS NOT SET TO THE CORRECT DATE, IT WILL CAUSE AN ERROR AND YOU WILL HAVE TO RESTART THE EPAF.

Enter an ID, select	the link to search for an ID, or generat	e an ID. Enter the Query Date	and select the Approval Category. Sele	ect Go.
* - indicates a required fie	ıld.			
ID: • 900127333	Rylee Cassandra Donovan	4 Q		After identifying an employee, click
Query Date: MM/D	D/YY/Y 06/01/2016			Approval Category drop down m
Approval Category:		00040	·	to select the EPAF for Summer
Go				School Overload Pay and/or Sum School Overload Pay (Continuing
				Education – Non Credit).
Employee Job Assig				
Type Position Suffix Primary 000201 00	Dir Field Experiences & Profes 0507, Te	eet Organization Start Date	End Date Last Paid Date Status 3 Active	
All Jobs				
			1	
				The Employee Job Assignments show all
		-		active positions. By clicking the All Jobs
				button, it will display all current and prev
				jobs.

• Enter the correct position numbers in the format indicated below and click on "GO". If a position number has already been assigned to the employee, select the radial dial at the end of the line and click on "GO". It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.

Position #:	Suffix #:	Description
000468	00	Overloads paid for credit hour courses.
004025	00	Overloads paid by other funds (not grants). The fund #s usually start with 108.
004030	00	Overloads paid by grant funding. The fund #s usually start with 3.
000478	00	Overloads paid by Continuing Education. The section numbers will start with a "c".
		Example: Section c21

New EPAF Job Selection

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



Overlo	ad/Add	Job, C00006								
Search	Туре 🖉	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Seleo
Q	New ob	000468	00	Summer School	1701, Summer School					۲
	Primary	000201	00	Dir Field Experiences & Profes	0507, Teacher Education	Sep 01, 2013			Active	0
All Job Next A	s Approval T	vpe Go								

- View Employee Class:
 - a. This section allows the originator to view the current employee's employment information.
 - b. Employment Status must equal (A) Active.
 - c. If employment status is listed something else other than Active, do not use this EPAF.
 - d. These fields are not able to be changed.

* - indicates a required field.

View Employee Employment Class

Item	Current Value	New Value
Employee Class Code: (Not Enterable)	F1, Faculty 9/12	
Employee Status: *(Not Enterable)	Active	A

• Enter Overload Pay Information

Field	Statement/Action	Action/Example
Job Begin Date:	If the "Current Value" column is populated, then	Leave "Job Begin Date"
		field blank
	Overload/Add Job, 000468-00 Summer School ii CSP686, Last Paid Date: Jun 26, 2014	
	Item Current Value New Value	
	Job Begin Date: MM/DD/YYYY 05/01/1993	
	Jobs Effective Date: MM/DD/YYYY(Not Enterabe) 07/30/2014 06/01/2015	
	Personnel Date: MM/DD/YYYY(Not Enterable) 07/30/2014 05/26/2015	
	Contract Type: (Not Enterable) Overload O	
	Title: * Summer School ii CSP686	
	Annual Salary: * 3000	
	FTE: * .25	
	Employee Class Code: *(Not Enterable) F1, Faculty 9/12 F3	
	Payroll Id: *(Not Enterable) SU SU	
	Leave Rept Pay ID: ★(Not Enterable) SU SU Job Change Reason: (Not Enterable) JBEND OVER	
	Step: (Not Enterable) 0 0 Job Status: (Not Enterable) Terminated	
	If the "Current Value" field is not populated, then,	→ Enter:
		(enter corresponding
	Overload/Add Job, 000468-00 Summer School	dates)
	Item Current Value New Value	06/01/2018 or
	Job Begin Date: MM/DD/YYYY	06/01/20 Summer
	Jobs Effective Date: MM/DD/YYYY(Not Enterable	School I
	Personnel Date: MM/DD/YYYY(Not Enterable) 05/31/2016	07/04/2049
	Contract Type: Title: *	07/01/2018 or 07/01/20 for
	Annual Salary: *	Summer School II
	FTE: *	
	Employee Class Code: *(Not Enterable)	
	Payroll Id: *(Not Enterable)	
	Time Entry Type: Not Selected	v
	Time Entry Type: Not Selected v	
	Leave Rept Pay ID: *(Not Enterable) SU Job Change Reason: (Not Enterable) OVER	
	Step: (Not Enterable)	
	Job Status: (Not Enterable)	
Job Effective	Field cannot be changed. Information is defaulted.	
Date:		
Job Personnel Date:	Field cannot be changed. Information is defaulted.	
Title:	Enter the course information for the overload that is being paid.	Example:
		Summer School ART
		101
		OR
		SSI ART 101/ART 103
Annual Salary:	Total amount to be paid for course overloads	3000.00
FTE:	FTE for overload is calculated as follows:	Enter the number FTE
	.25 = 1 course overload .75 = 3 course overload	for the number of course overloads:
	.50 = 2 course overload $1.00 = 4$ course overload	
		Example: .25
Contract Type	Field cannot be changed. Information is defaulted.	
Employee Class Code	Field cannot be changed. Information is defaulted.	
OULE		

Payroll ID	Payroll ID will default to SU . Field can be change.	Payroll ID SU should remain defaulted.
Leave Rept Pay ID	The Leave Report Pay ID should match the Payroll ID above.	Match Leave Rept Pay ID to Payroll ID SU
Job Change Reason	Field cannot be changed. Information is defaulted.	
Step	Field cannot be changed. Information is defaulted.	
Job Status	Field cannot be changed. Information is defaulted.	

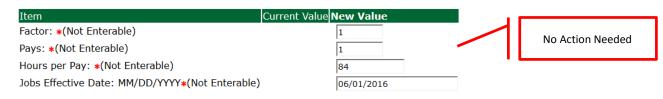
Overload/Add Job, 000468-00 Summer School

Item	Current Value New Value
Job Begin Date: MM/DD/YYYY	
Jobs Effective Date: MM/DD/YYYY(Not Enterable)	06/01/2016
Personnel Date: MM/DD/YYYY(Not Enterable)	05/31/2016
Contract Type:	Overload v
Title: *	Summer School ART 101
Annual Salary: \star	3000.00
FTE: *	.25
Employee Class Code: *(Not Enterable)	F3
Payroll Id: *(Not Enterable)	SU
Leave Rept Pay ID: * (Not Enterable)	SU
Job Change Reason: (Not Enterable)	OVER
Step: (Not Enterable)	0
Job Status: (Not Enterable)	A

• Update Factor, Pays, and Hours

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Update Factors, Pays and Hours, 000468-00 Summer School



• Terminate Employee Job

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Item	Current Value New Value		
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)	06/29/2016		No Action Needed
Job Status: *(Not Enterable)	Т	-	NO ACTION NEEded
Job Change Reason: * (Not Enterable)	JBEND		

- Update Default Earnings
 - a. In the "CURRENT" section If there is not a date entered under the effective date, then a new effective date will need to be entered under the "NEW VALUE" section.

If a current date is not listed under the "CURRENT" effective date, then enter 06/01/2017 for	Update Default Earnings, 000468-00 Summer Current Effective Date[Engangs]Hours or Units Per Pay Deemo		
Summer School I or 07/01/2017	Effective Date MM 'DD/YYYY Earnings Not Selected	Hours or Units Per Pay Deemed Hours Special Rate	Shift End Date MM/DD/YYYY Remove
for Summer School II in the	Not Selected		1
"NEW VALUE EFFECTIVE	Not Selected	·	1
DATE" field.	Not Selected	v)	1
	Not Selected	v	

- b. Enter 06/01/2018 for Summer School I or 07/01/2018 for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.
- c. Select SUM, Summer Pay as the Earnings Code using the drop down box.
- d. Enter **84.00** as the Hours or Units Per Pay.

Update Default Earnings, 000468-00 Summer School

Current Effective DateEarningsHours or Units Per PayDeemed HoursSpecial RateShiftEnd Date

New Value				
Effective Date MM/DD/YYYY	Earnings	Hours or Units Per Pay	Deemed Hours Special Rate	Shift End Date MM/DD/YYYY Remove
06/01/2016	SUM, Summer Pay v	84.00		
	Not Selected			
	Not Selected v			
	Not Selected v]		

Update Default Ear	rnings, 000468-00 Summer Schoo		ing on the summe ast Paid Date: Jul 30, 2013				
Current							
Effective Date Earnin 06/01/2013 SUM,	Summer Pay	eemed Hours Spe	ecial Rate Shift End Date 1				
,	, 84.00						
New Value							
Effective Date MM/DI		Hou	urs or Units Per Pay Deemed	Hours Special Rate	Shift End Date MM/DD/	YYY Remove	
06/01/2013	SUM, Summer Pay	•	84.00				
	Not Selected			,			
	Not Selected	•			1	Enter 06/01/2018	or 07/01/2018
	Not Selected	•				the new effective	e date.
					1		
	Not Selected	•					
				I	1		

- Labor Distribution Update if Needed
 - a. In the "CURRENT" section the current labor codes and the effective date of the last change will default into the form.
 - b. In the "NEW" section add new rows or make changes to the existing rows.
 - c. Changes to the accounting information will be <u>LIMITED</u>. The correct accounting information should default in the field according to the position number being used.
 - d. The fund, organization, account, and program codes will <u>NOT</u> need to be change unless payment is being charged by grant or other funds.
 - e. EFFECTIVE DATE: The effective date should equal either: 06/01/2017 or 07/01/2017 depending on the summer school session.
 - f. Apply the appropriate changes to the field if necessary.

MAKE SURE THE DATE IN THE "EFFECTIVE DATE" FIELD IS 06/01/2018 OR 07/01/2018 DEPENDING ON THE SUMMER SCHOOL SESSION. IF NOT, THE EPAF WILL CONTAIN AN ERROR.

Current Effective Date: 0	fective Date: 06/01/2016 DA[Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date										sted in the field is: 6/01/2018
New Effective Date: M	IM/DD/YYYY	06/01/2016						- L	Summe	er School II: 0	7/01/2018
COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance (Override End Date
Q 1	Q 10	Q 1701	Q 61200	Q 0103	<u>م</u>				100.00		
۹ 🗆		Q	۹.	_ Q							
۹ 🗌			۹	Q.	_ \	_					_
Q	_ Q			_ Q.	_ Q						
۹ <u> </u>	_ Q [- Q.		_ Q			_i	- i		
								Total:	100.00)	
ď									_		
Default from Index	Save and Add	New Rows									

Steps to change Labor Distributions

1. Change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.

rrent	r Distributio	ns, 000468-0	00 Summer S	chool					-	will default to the query te. This needs to be		
ective Date:	: 06/01/2016 d Organization	Account	ram Activity I or		ost Percent Enc	cumbrance Ove	erride End Date			-		
lew Effective Date: MM/DD/YYYY 06/01/2016									Summer School I: 06/01/2018 Summer School II: 07/01/2018			
		1		D	A							
A Index	Fund Q 10	Organiza Q 1701	Q 61200	Program Q 0103	Activity	Location	Project	Cost Perce	ont Encur	nbrance Override End Date		
									~>>	0		
	Q	Q	Q	Q	Q					Change this percentag to 0.00 and click on Sa		
	Q	Q	Q	Q	Q.					and Add New Rows.		
								Total:	00.00	and Add New Nows.		
			_									
efault from Inde	ex Save and Ad	Id New Rows								I		
date Labo	r Distributio	ns, 000468-0	00 Summer S	chool								
rrent fective Date:	: 06/01/2016											
		Account Progr	ram Activity Loc	ation Project C	ost Percent Encu	umbrance Ove	rride End Date					
N												
	MM/DD/YYYY	,	tion Account	Drogenart	Activity	Location	Drojost	Cost Dares	nt Engur	shranca Ovarride End Date		
A Index	Fund Q 10	Organizat	tion Account	Program Q 0103	<u> </u>	Location	Project	Cost Perce	0.00	brance Override End Date		
		۹ 🛛		Q								
			Q		Q		-					
		Q	Q									
								Total: 10	0.00			
		d New Rows	formation. TI	he following	must be ente	ered for ead	ch line.					
5. Enter f	the new ac f. COA = g. Fund N h. Organi	counting inf enter 1. lo. zation No.		he following	must be ente	ered for eac	ch line.					
f S H	the new ac f. COA = g. Fund N h. Organi i. Accour	counting inf enter 1. lo. zation No. nt No. = 612	200				ch line.					
5. Enter f	the new ac f. COA = g. Fund N h. Organi i. Accour	counting inf enter 1. lo. zation No. nt No. = 612	200		must be ente e sample bele		ch line.					
5. Enter f i j	the new ac f. COA = g. Fund N h. Organi i. Accour	ccounting inf enter 1. Vo. zation No. nt No. = 612 ntage = total	200				ch line.					
5. Enter f i j	the new ac f. COA = g. Fund N h. Organi i. Accour j. Percen	ccounting inf enter 1. Vo. zation No. nt No. = 612 ntage = total	200				ch line.					
5. Enter f i j	the new ac f. COA = g. Fund N h. Organi i. Accour j. Percen	ccounting inf enter 1. Vo. zation No. nt No. = 612 ntage = total	200				ch line.					
5. Enter f i j o "Save a	the new ac f. COA = g. Fund N h. Organi i. Accour j. Percen and Add New	ccounting inf enter 1. lo. zation No. nt No. = 612 tage = total w Rows"	200 s must equa	ıl 100%. See			ch line.					
5. Enter f i j o "Save a date Labor	the new ac f. COA = g. Fund N h. Organi i. Accour j. Percen and Add New	ccounting inf enter 1. lo. zation No. nt No. = 612 tage = total w Rows"	200	ıl 100%. See			ch line.					
5. Enter f i j to "Save a date Labor rent	the new ac f. COA = g. Fund N h. Organi i. Accour j. Percen and Add New Distributions	ccounting inf enter 1. lo. zation No. nt No. = 612 tage = total w Rows"	200 s must equa	ıl 100%. See			ch line.					
5. Enter f g i j to "Save a date Labor rrent ective Date: 0	the new ac f. COA = g. Fund N h. Organi i. Accour j. Percen and Add New Distributions	counting inf enter 1. No. zation No. nt No. = 612 ntage = total w Rows"	200 s must equa Summer Schoo	al 100%. See		ow						
5. Enter f g i j to "Save a date Labor rent ective Date: 0 A[Index Fund	the new ac f. COA = g. Fund N h. Organi i. Accour j. Percen and Add New Distributions,	counting inf enter 1. No. zation No. nt No. = 612 ntage = total w Rows" , 000468-00 s	200 s must equa Summer Schoo	al 100%. See	e sample bel	ow						
5. Enter f g j to "Save a date Labor rent cotive Date: 0 \Index	the new ac f. COA = g. Fund N h. Organi i. Accour j. Percen and Add New Distributions 00/01/2016 00rganization Ac MM/DD/YYYY	ccounting inf enter 1. Jo. zation No. nt No. = 612 ntage = total w Rows" , 000468-00 s	200 s must equa Summer Schoo Activity Location	al 100%. See d d project[Cost]Pe Program A	e sample bel rcent[Encumbran	ow	d Date		mbrance Oy	erride End Date		
5. Enter f g j to "Save a date Labor rrent ective Date: 0 A Index M	the new ac f. COA = g. Fund N h. Organi i. Accour j. Percen and Add New Distributions, 06/01/2016 00rganization MM/DD/YYYY Fund Q 10	ccounting inf enter 1. lo. zation No. nt No. = 612 ntage = total w Rows" , 000468-00 s	200 s must equa Summer Schoo Activity Location	al 100%. See d d Project[Cost]Pe	e sample bel rcent ctivity Loc	OW nce Override En	d Date	0.00	mbrance Ov			
5. Enter f g h j to "Save a date Labor rrent ective Date: 0 A Index A Index	the new ac f. COA = g. Fund N h. Organi i. Accour j. Percen and Add New Distributions 06/01/2016 0rganization MM/DD/VVVV 0 Fund 0 0 0 0 0 0 0 0 0 0 0 0 0	ccounting inf enter 1. No. zation No. nt No. = 612 ntage = total w Rows" , 000468-00 s	200 s must equa Summer Schoo Activity Location Activity Location Activity Location Activity Location Activity Location	al 100%. See ol Project[Cost]Pe Q 0103 Q 010	e sample belo	OW nce Override En	d Date		mbrance Ov	Enter COA, Fund #,		
5. Enter f S i j to "Save a date Labor rrent ective Date: 0 A[Index Fund	the new ac f. COA = g. Fund N h. Organi i. Accour j. Percen and Add Nev Distributions, 06/01/2016 0rganization MM/DD/VYYY Fund Q 10 Q 10	ccounting inf enter 1. Io. zation No. nt No. = 612 ntage = total w Rows" , 000468-00 s	200 s must equa Summer Schoo Activity Location Activity Location Activity Location Activity Location Activity Location Activity Location Activity Location	n Project Cost Pe	rcent Encumbrar	OW nce Override En	d Date	0.00	nbrance Ov	Enter COA, Fund #, Org#, and Account#		
5. Enter f g h j to "Save a date Labor rrent ective Date: 0 A Index A Index	the new ac f. COA = g. Fund N h. Organi i. Accour j. Percen and Add New Distributions 06/01/2016 0rganization MM/DD/YYYY Fund Q 10 Q 10	counting inf enter 1. No. zation No. nt No. = 612 ntage = total w Rows" , 000468-00 s count Program	200 s must equa Summer Schoo Activity Location Activity Location (Activity Location) (Activity Location) (Activity Location) (Activity Location) (Activity Location) (Activity Location)	al 100%. See	rcent Encumbrar	OW nce Override En	d Date	0.00 25.00 75,00	mbrance Ov	Enter COA, Fund #,		
5. Enter f g h j to "Save a date Labor rrent ective Date: 0 A Index A Index	the new ac f. COA = g. Fund N h. Organi i. Accour j. Percen and Add New Distributions 06/01/2016 0rganization MM/DD/YYYY Fund Q 10 Q 10	counting inf enter 1. No. zation No. nt No. = 612 ntage = total w Rows" , 000468-00 s count Program	200 s must equa Summer Schoo Activity Location Activity Location (Activity Location) (Activity Location) (Activity Location) (Activity Location) (Activity Location) (Activity Location)	al 100%. See	rcent Encumbrar	OW nce Override En	d Date	0.00	nbrance Ov	Enter COA, Fund #, Org#, and Account#		
5. Enter f g h j to "Save a date Labor rrent ective Date: 0 A Index A Index	the new ac f. COA = g. Fund N h. Organi i. Accour j. Percen and Add New Distributions 06/01/2016 0rganization MM/DD/YYYY Fund Q 10 Q 10	counting inf enter 1. No. zation No. nt No. = 612 ntage = total w Rows" , 000468-00 s count Program 6/01/2016 0rganization 4 1701 4 1701 4 155 4 2	200 s must equa Summer Schoo Activity Location Activity Location (Activity Location) (Activity Location) (Activity Location) (Activity Location) (Activity Location) (Activity Location)	al 100%. See	rcent Encumbrar	OW nce Override En	d Date	0.00 25.00 75,00	mbrance Ov	Enter COA, Fund #, Org#, and Account#		

- 6. Click on the box under the "Remove" Column to remove the old accounting information. The percentage should be set 0.00%.
- 7. Click on Save and Add New Rows. The old accounting information should be removed.

	06/01/2016	Account Program	Activity		et Dercent En c	umbranca Ova	rrida End Dat				
muexprund	iorganizationp	Account Program	ACTIVITYLOCA	nonprojecteo	sqreitenqent	unibrance ove	Thue End Dat				
tive Date:	MM/DD/YYYY	06/01/2016									
Index	Fund	Organization		Program	Activity	Location	Project	Cost		Encumbrance Override End Date Remove	
	Q 10	Q 1701	Q 61200	Q 0103	4				.00		
	Q 10	Q 1701	Q 61200	Q 0103	Q				25.00		Click the remove
			,				1				button on the line
	Q 340231	Q. 4155	Q 61200	Q 0609	Q,				75.00		
			9					_			that has 0.00%
-		- a	- Q		-		-	_	·		entered. Then clic
			- Q		- Q		-		· · · · · ·		
-i	_ Q		<u>م</u>	Q	- Q.		- i	_i			on "Save and Add
								Total:	100.00		New Rows.
			1						100.00		New News.

8. Routing Queue

- a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- b. For Overloads, all EPAFs must have a Chair and Dean level approval.
- c. For Grants, <u>all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office</u>. Other approval levels will default.
- d. For Continuing Education courses, add <u>Dean, Graduate and Continuing Education and Continuing Education (Marilyn</u> <u>Read).</u>

Approval Queue			
Approval Level	User Name		Required Action Rem
10 - (CHAIR) Chair	~ Q.		Approve 🗸 🗆
15 - (DEAN) Dean	~ Q.		Approve 🗸 🗆
39 - (ACAFF1) Academic Affairs (Hayley)	V HMURRELL	Hayley H Murrell	Approve 🗸 🗆
40 - (ACDAFF) Academic Affairs	V CBALLARD	Cheryl M Ballard	Approve 🗸 🗆
45 - (PROVOS) Provost of Academic Affairs	V CMCADAMS	Charles Alan McAdams	Approve 🗸 🗆
50 - (HRFYI) HR FYI	V SMPHILLIPS	Samantha Myers Phillips	FYI v
65 - (BUDGET) Budget Office		Beverly Coons Lindsey	Approve 🗸 🗆
70 - (PAYROL) Payroll FYI (Monthly)	V MPHILLIPS	Mary Ruth Phillips	FYI v
75 - (HRDIR) Human Resource Director	✓ ^Q LGIGER	Lisa Weeks Giger	Approve 🗸 🗆
99 - (SUPER) Superuser	V MPHILLIPS	Mary Ruth Phillips	Apply 🗸 🗆
Not Selected	~ Q		Not Selected v
Not Selected	v Q		Not Selected v
Not Selected	✓ C Search		Not Selected v
Not Selected	~ Q		Not Selected v

Save and Add New Rows

9. Click on the "Save and Add New Rows".

10. Comments

- a. In the "Comments" section, enter comments for the approvers with an explanation for the action.
- b. In the "Comment" section, also enter the following for overload information separated as shown below:
 - i. CRN #:
 - ii. Credit Hour:
 - iii. Course Number:
 - iv. Course Title:
 - v. Section:
 - vi. Enrollment:
 - vii. Reason for Overload: Summer Pay for Full Time Faculty

Comment



Enter additional information here.

Enter: CRN #: | Credit Hour: | Course #: | Course Title | Section: | Enrollment: | Reason for Pay: Summer Pay for Full time faculty/ and whether the course is offered through Continuing Education.

11. Save EPAF

- a. Hit the "Save" Button at the bottom of the form.
- b. Return to the top of the form.
- c. The message should display "Your change was saved successfully."
- d. Check your date entry

Electronic Personnel Action Form

Your change was saved successfully.

Pentor the information for the EPAr and either Save or Submit



- Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit. a.
- The EPAF automatically routes to the approvers in the order of their approval levels. b.

Electronic Personnel Action Form

The transaction has been successfully submitted. Enter the information for the EPAF and either Save or Submit Rylee Cassandra Donovan, 900127333 ame and ID: 1636 Query Date: Jun 01, 2016 ransaction: ransaction Status: Pending proval Category: Summer School Overload, D00040

Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Errors and Warning Messages

Message Type	Description
WARNING	*WARNING* This employee is terminated on the Employee Form.
WARNING	*WARNING* The Employee's Term Date and Reason should be removed from PEAEMPL.
WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
	WARNING WARNING WARNING

🛊 - indicates a required field.

Delete

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

How to Process:

Summer School Adjunct Re-Appointment

Summer School Adjunct Re-Appointment (Continuing Education) Summer School Adjunct Re-Appointment – Course Taught Over Both Sessions Summer School Adjunct Re-Appointment – (Continuing Education) - Course Taught Over Both Sessions

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to rehire an adjunct. The steps below should be followed:

- 1. Enter the employee's 900# or click on the \bigcirc magnifying glass to search for an employee's 900#.
- 2. The query date will default to today's date. Change the query date to:
 - a. Summer School I: 06/01/2018
 - b. Summer School II: 07/01/2018
- 3. Select from the drop down approval category box:
 - Summer School Adjunct Re-Appointment
 - Summer School Adjunct Re-Appointment (Continuing Education)
 - Summer School Adjunct Re-Appointment (Course Taught Over Both Sessions)
 - Summer School Adjunct Re-Appointment Continuing Education (Course Taught Over Both Sessions

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.

ID: + Quer Appr	cates a requ 900127334 y Date: M oval Cate	4 Olivia Caden		djunct	Rehire, D	₩ Q 00042			•	After identifying an employee, click the Approval Category drop down menu to select the Summer School EPAF for Adjunct Rehire and/or
Go										Adjunct Rehire (Continuing Education – Non Credit).
Employee	Job Assignn	nents								
Туре	Position Suffi	xTitle	Time Sheet Orga	anization	Start Date	End Date	Last Paid Date	Status		
Primary	000377 00	Human Resources Assistant	4113, Human Re	esource	Jan 01, 2014			Active		
Secondary	000458 00	Square dance instructor	0387, Social Scie	ence	Sep 01, 2014	May 31, 2015		Terminated		
Secondary	000478 00	Adjunct Instr Teach Ed	0387, Social Scie	ence	Feb 01, 2015	May 31, 2015		Terminated		
Active Jo	bs		Ē	EPAF App	rover Summary	EPAF Original	or Summary	a	he Employee Job Assi ctive positions. By clic utton, it will display al	king the All Jobs

- 4. Click on "Go" to begin the Summer School EPAFs for Adjunct Rehire and/or Adjunct Rehire (Continuing Education Non Credit).
- 5. Click on the button "All Jobs".
- 6. Select the position in which to reactivate by clicking on the radial dial at the end of the row. The position to reactivate will usually be position 000468 for credit courses and 000478 for Continuing Education Non Credit courses.
- 7. If the employee does not have a job with the correct position number, then enter the position number in the format indicated below and click on "GO". It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.

jobs.

Position #:	Suffix #:	Description
000468	00	Overloads paid for credit hour courses.
004025	00	Overloads paid by other funds (not grants). The fund #s usually start with 108.
004030	00	Overloads paid by grant funding. The fund #s usually start with 3.
000478	00	Overloads paid by Continuing Education. The section numbers will start with a "c".
		Example: Section c21

Overlo	ad/Add J	ob, C00006								
Search	Туре	Desition	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	NewJob	000468	00	Summer School	1701, Summer School					•
	Primary	000003	00	Assistant Professor of Art	0507, Teacher Education	Aug 15, 2013			Active	0
All Jo Next /	bs Approval T	ype Go				1	1	1		

Enter Adjunct Employment Record – See table below for instructions.

Field	Statement/Action	Action/Example
Home Organization	Change if needed. A change is usually not needed	0387
Distribution Org Change if needed. If Home organization is change, then distribution org must match home org.		
Current Hire Date	Field cannot be changed. Information is defaulted.	No action needed
Employee Status	Field cannot be changed. Information is defaulted.	No action needed
Employee Class Code	Enter the following if needed: (Usually a change is not needed) F3=adjunct employee RT=reemployment of PERS retiree	F3 or RT
Home COAS	Field cannot be changed. Information is defaulted.	No action needed
Term Reason Code:	Field cannot be changed. Information is defaulted.	No action needed
Terminate Date:	Field cannot be changed. Information is defaulted.	No action needed
Last Work Date:	Field cannot be changed. Information is defaulted.	No action needed

An * is a required field.

Item	Current Value	New Value
Home Organization:	0377, Music	
Distribution Orgn:	0377, Music	Q.
Current Hire Date: MM/DD/YYYY(Not Enterable	e) 01/01/2016	
Employee Status: *(Not Enterable)	Active	A
Employee Class Code:	F3, Faculty P/T < 9 Months	s 🔍
Home COAS: *(Not Enterable)	1	1
Term Reason Code: (Not Enterable)		JE
Termination Date: MM/DD/YYYY(Not Enterable)	06/29/2016
Last Work Date: MM/DD/YYYY(Not Enterable)		06/29/2016

• Enter Overload Pay Information

Field	Si	tatement/Action		Action/Example
Job Begin Date:	If the "Current Value" column is populated		>	Leave "Job Begin Date" field blank
	Overload/Add Job, 000468-00 Summer	School ii CSP686, Last	Paid Date: Jun 26, 2014	
	Item	Current Value	New Value	
	Job Begin Date: MM/DD/YYYY	05/01/1993		
	Jobs Effective Date: MM/DD/YYYY(Not Enterat	e) 07/30/2014	06/01/2015	
	Personnel Date: MM/DD/YYYY(Not Enterable)	07/30/2014	05/26/2015	
	Contract Type: (Not Enterable)	Overload	0	
	Title: ★	Summer School ii CSP686	6	
	Annual Salary: \star	3000		
	FTE: ★	.25		
	Employee Class Code: *(Not Enterable)	F1, Faculty 9/12	F3	
	Payroll Id: \star (Not Enterable)	SU	SU	
	Leave Rept Pay ID: *(Not Enterable)	SU	SU	
	Job Change Reason: (Not Enterable)	JBEND	OVER	
	Step: (Not Enterable)	0	D	
	Job Status: (Not Enterable)	Terminated	A	
	If the "Current Value" field is not populate	d, then,		Enter:
				(enter corresponding
	Add Employee Job, 000468-00 S	Summer School		dates)
	Item	Current Value New	v Value	06/01/2018 - Summer
	Job Begin Date: MM/DD/YYYY		←	School I
	Jobs Effective Date: MM/DD/YYYY(Not En	teratile) 06/	/01/2016	
	Personnel Date: MM/DD/YYYY(Not Entera	ble) 05/	/31/2016	07/01/2018 - for Summer School II
	Contract Type:	Se	condary v	Summer School II
	Title: *			
	Annual Salary: *			
	FTE: *			
	Employee Class Code: *(Not Enterable)	F3		
	Payroll Id: *(Not Enterable)	su		
	Leave Rept Pay ID: *(Not Enterable)	SU		
	Job Change Reason: (Not Enterable)	AD	JUN	
	Step: (Not Enterable)	0		
	Job Status: (Not Enterable)	A		
Job Effective Date:	Field cannot be changed. Information is d	lefaulted.		
Job Personnel Date:	Field cannot be changed. Information is d	lefaulted.		
Title:	Enter the course information for the overle	bad that is being paid.		Example:
				Adjunct Instr in Art
Annual Salary:	Total amount to be paid for course overlo	ads		3000.00
FTE:	FTE for overload is calculated as follows:			Enter the number FTE for the number of
	.25 = 1 course overload	75 = 3 course overload		course overloads:
		00 = 4 course overload		
				Example: .25

Contract Type	Field cannot be changed. Information is defaulted.	
Employee Class Code	Field cannot be changed. Information is defaulted.	
Payroll ID	Payroll ID will default to SU . Field can be change.	Payroll ID SU should remain defaulted.
Leave Rept Pay ID	The Leave Report Pay ID should match the Payroll ID above.	Match Leave Rept Pay ID to Payroll ID SU
Job Change Reason	Field cannot be changed. Information is defaulted.	
Step	Field cannot be changed. Information is defaulted.	
Job Status	Field cannot be changed. Information is defaulted.	

• Update Factor, Pays, and Hours

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Update Factors, Pays and Hours, 000468-00 Summer School

Item	Current Value New Value	
Factor: *(Not Enterable)	1	
Pays: *(Not Enterable)	1	No Action Needed
Hours per Pay: *(Not Enterable)	84	
Jobs Effective Date: MM/DD/YYYY*(Not Enterable) 06/01/2016	_

• Terminate Employee Job

Field	Statement/Action	Action/Example
Job Begin Date:	Field cannot be changed. Information is defaulted.	None
Factor:	Field cannot be changed. Information is defaulted.	None
Pays:	Field cannot be changed. Information is defaulted.	None
Hours per Pay:	Field cannot be changed. Information is defaulted.	None

Terminate Job Only, 000468-00 Summer School

Item	Current Value New Value	
Jobs Effective Date: MM/DD/YYYY*(Not Enterable)	06/29/2016	ı ————————————————————————————————————
Job Status: *(Not Enterable)	Т	No Action Needed
Job Change Reason: * (Not Enterable)	JBEND	

• Update Default Earnings

a. In the "CURRENT" section – If there is not a date entered under the effective date, then a new effective date will need to be entered under the "NEW VALUE" section.

If a current date is not listed under the "CURRENT" effective date, then enter 06/01/2017 for	Opdate Default Earnings, 000468-00 Summer Current Effective DateEarningsHours or Units Per Pay/Deeme New Value		
Summer School I or	Effective Date MM/I D/YYYY Earnings	Hours or Units Per Pay Deemed Hours Special Rate	Shift End Date MM/DD/YYYY Remove
07/01/2017 for Summer	Not Selected	· · · · · · · · · · · · · · · · · · ·	
School II in the "NEW	Not Selected	· · · · · · · · · · · · · · · · · · ·	
VALUE EFFECTIVE DATE" field.	Not Selected	~	1
	Not Selected	~	

- b. Enter 06/01/2018 for Summer School I or 07/01/2018 for Summer School II in the "NEW VALUE EFFECTIVE DATE" field.
- c. Select SUM, Summer Pay as the Earnings Code using the drop down box.
- d. Enter **84.00** as the Hours or Units Per Pay.

Update Default Earnings, 000468-00 Summer School

Current Effective Date	Earnings Hour	rs or Units Per Pay Deemed	Hours Special Pa	te Shift End Date			
New Value	Lanningsprour	s of onits per pay beenied					
	MM/DD/YYYY	/Earnings	Но	Irs or Units Per Pay Deen	ned Hours Special Rate	Shift End Date	MM/DD/YYYY Remove
06/01/2016		SUM, Summer Pay	~	84.00		1	
		Not Selected	~			1	
		Not Selected	~			1	
		Not Selected	~			1	

If the fields are populated under the "CURRENT EFFECTIVE DATE" as shown below, then under the "NEW VALUE EFFECTIVE DATE", enter 06/01/2018 or 07/01/2018 depending on the summer session.

Current Effective Date Earnings	Hours or Units Per Pay Dee	med Hours Speci	al Rate Shifi End Date		
06/01/2013 SUM, Sumn	ner Pay 84.00		1		
New Value					
Effective Date MM/DD/YYY) Earnings	Hours	or Units Per Pay Deemed Hours Special Rate	Shift End Date MM/DD/YYYY	Remove
06/01/2013	SUM, Summer Pay	•	B4.00		
	Not Selected	·			Enter 06/01/2018 or 07/01/201
	Not Selected	•		1	the new effective date.
	Not Selected	•			
	Not Selected	•			

- Labor Distribution Update if Needed
 - a. In the "CURRENT" section the current labor codes and the effective date of the last change will default into the form.
 - b. In the "NEW" section add new rows or make changes to the existing rows.
 - c. Changes to the accounting information will be <u>LIMITED</u>. The correct accounting information should default in the field according to the position number being used.
 - d. The fund, organization, account, and program codes will <u>NOT</u> need to be change unless payment is being charged by grant or other funds.
 - e. EFFECTIVE DATE: The effective date should equal either: 06/01/2018 or 07/01/2018 depending on the summer school session.
 - f. Apply the appropriate changes to the field if necessary.

MAKE SURE THE DATE IN THE "EFFECTIVE DATE" FIELD IS 06/01/2018 OR 07/01/2018 DEPENDING ON THE SUMMER SCHOOL SESSION. IF NOT, THE EPAF WILL CONTAIN AN ERROR.

Update Labor	Distributio	ns, 000468-00	0 Summer Sc	hool						e sure the da ECTIVE DA	ate listed in the TE" field is:	e
Current Effective Date: (COA Index Fund New Effective Date: 1	Organization		m Activity Loca	ntion Project Co	stPercentEnc	umbrance Ove	erride End Da	nte			I: 06/01/2018 II: 07/01/2018	-
COA Index	Fund	Organizati	on Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override End Date	e
2 1	Q 10	Q 1701	Q 61200	Q 0103	<u> </u>				100.00			
	٩,	۹ 🗌	Q.	_ Q								
·		Q		Q.	_ Q. [
		Q	Q	_ Q				_	_			
	_ Q	Q	Q.	_ Q				_	_			
	,			,				Total:	100.00)		
1									_			
Default from Index	Save and Ad	d New Rows										

Steps to change Labor Distributions

2. Change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.

Curre Effect COA I New	nt ive Date: 0 ndex Fund	6/01/2016	ns, 000468-00 Account Program			stPercentEnc	umbrance Ove	erride End Da	te		
СОА	Index	Fund	Organizatio	on Account	Program	Activity	Location	Project	Cost	t Percent Encumbrance (Override End Date
Q 1		Q 10	Q 1701	61200	Q 0103					100.00	
٩,	- i			_ <	_ <		—i—	- í	—i—		
٩,	- i	_ <	Q						—i—		Change this
٩,	- i			_ <	_ <		—i—	- í	—i—	—i——i——>	Change this
٩,	- i	- Q	Q		_ <				—i—		percentage to 0.00
✔ Defau	t from Index	Save and Add	d New Rows	<	,		,		Total	100.00	and click on Save and Add New Rows.

- **13.** Enter the new accounting information. The following must be entered for each line.
 - a. COA = enter 1.
 - b. Fund No.
 - c. Organization No.
 - d. Account No. = 61200
 - e. Percentage = totals must equal 100%. See sample below

Click to "Save and Add New Rows"

Update Labor Distributions, 000468-00 Summer School

Effective Date: 06/01/2016 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date New Effective Date: MM/DD/YYYY 06/01/2016 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override Enc	
New Effective Date: MM/DD/YYYY 06/01/2016	
Effective Date: MM/DD/YYYY 06/01/2016	
Effective Date: MM/DD/YYYY 06/01/2016	
COA Tuday Fund Comparisation Assault Decomposition Assistant Cont Decomposed Fundamentary Contraction Contraction	
	d Date
	nter COA, Fund #,
	rg#, and Account#
	ad porcontago
Total:	nd percentage.
100.00 Be	e sure
	ercentages =
Default from Index 5 Save and Add New Pows	0%.

14. Click on the box under the "Remove" Column to remove the old accounting information. The percentage should be set 0.00%.

15. Click on Save and Add New Rows. The old accounting information should be removed.

Current Effective Date:	Distributions				st Percent Enc	umbrance Ove	rride End Da	te			
lew Effective Date:	MM/DD/YYYY	06/01/2016									
OA Index	Fund	Organizatio		Program	Activity	Location	Project	Cost		Encumbrance Override End Date Remove	
1	Q 10	Q 1701	Q 61200	Q 0103	~				.00		Click the remove
1	Q 10	Q 1701	Q 61200	Q 0103	٩				25.00		
1	Q 340231	Q. 4155	Q 61200	Q 0609					75.00		button on the line
1	340231	~ 4155	61200	- 10603					75.00		that has 0.00%
	Q.	٩,	Q	٩,	0						entered. Then clicl
			- 0					_			on "Save and Add
Default from Inde	X Save and Add	New Rows	<			I	1	Total:	100.00)	New Rows.

16. Routing Queue

- a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- b. For Overloads, all EPAFs must have a Chair and Dean level approval.
- c. For Grants, all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office. Other approval levels will default.
- d. For Continuing Education courses, add <u>Dean, Graduate and Continuing Education and Continuing Education (Marilyn</u> <u>Read).</u>

Approval Queue

Approval Level	User Name		Required Action	Remo
10 - (CHAIR) Chair	~ Q		Approve	✓
15 - (DEAN) Dean	~ Q.		Approve	✓
39 - (ACAFF1) Academic Affairs (Hayley)		Hayley H Murrell	Approve	✓
40 - (ACDAFF) Academic Affairs	✓ CBALLARD	Cheryl M Ballard	Approve	✓
45 - (PROVOS) Provost of Academic Affairs	CMCADAMS	Charles Alan McAdams	Approve	✓
50 - (HRFYI) HR FYI	✓ Q SMPHILLIPS	Samantha Myers Phillips	FYI	✓
65 - (BUDGET) Budget Office		Beverly Coons Lindsey	Approve	✓
70 - (PAYROL) Payroll FYI (Monthly)	V MPHILLIPS	Mary Ruth Phillips	FYI	✓
75 - (HRDIR) Human Resource Director	V Q LGIGER	Lisa Weeks Giger	Approve	✓
99 - (SUPER) Superuser	V MPHILLIPS	Mary Ruth Phillips	Apply	✓
Not Selected	~ Q		Not Selected	~
Not Selected	~ Q.		Not Selected	~
Not Selected	↓ Search		Not Selected	~
Not Selected	~ Q		Not Selected	~

Save and Add New Rows

17. Click on the "Save and Add New Rows".

18. Comments

- a. In the "Comments" section, enter comments for the approvers with an explanation for the action.
- b. In the "Comment" section, also enter the following for overload information separated as shown below:
 - i. CRN #:
 - ii. Credit Hour:
 - iii. Course Number:
 - iv. Course Title:
 - v. Section:
 - vi. Enrollment:
 - vii. Reason for Adjunct:

Comment



Enter additional information here.

Enter: CRN #: | Credit Hour: | Course #: | Course Title | Section: | Enrollment: | Reason for Adjunct: | and whether the course is offered through Continuing Education.

19. Save EPAF

- a. Hit the "Save" Button at the bottom of the form.
- b. Return to the top of the form.
- c. The message should display "Your change was saved successfully."
- d. Check your date entry

Electronic Personnel Action Form

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

Name and ID:	Olivia Caden Silver, 900127334	
Transaction:	1637	Query Date: Jun 01, 2016
Transaction Status:	Waiting	
Approval Category	Summer School Adjunct Rehire, D00042	
Save Submit	Delete	

20. Submit EPAF

- a. Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
- b. The EPAF automatically routes to the approvers in the order of their approval levels.

Electronic Personnel Action Form

The transaction has been successfully submitted.

Enter the information for the EPAF and either Save or Submit

Name and ID:	Olivia Caden Silver, 900127334	
Transaction:	1637	Query Date: Jun 01, 2016
Transaction Status:	Pending	
Approval Category:	Summer School Adjunct Rehire, D00042	!

How to Process:

One Time Payment – Extra Services (Non Academic Affairs) One Time Payment – Extra Services (Academic Affairs)

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to process payment for additional duties/services performed. The steps below should be followed:

- 1. Enter the employee's 900# or click on the \bigcirc magnifying glass to search for an employee's 900#.
- The query date will default to today's date. Change the query date to the first day of the month in which the pay is to be issued. MM/01/20___
 - EXAMPLE: 01/01/2018 OR 02/01/2018 OR 03/01/2018
- Select One Time Payment Extra Services (Non Academic Affairs) or One Time Payment Extra Services (Academic Affairs) from the drop down approval category box.

Non Academic Affairs = <u>any departments that do not report to the Provost</u>, but report to other Vice Presidents/Directors. This EPAF is used for payments by departments that do not report to the Provost.

Academic Affairs = <u>departments that report to the Provost</u>. This EPAF is used for payments made by departments/divisions that report directly to the provost.

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE FRIST DAY OF THE MONTH YOU WANT THE TRANSACTION TO TAKE PLACE. IF IT IS NOT SET TO THE CORRECT DATE, IT WILL CAUSE AN ERROR AND YOU WILL HAVE TO RESTART THE EPAF.

	★ - indicates a required field.	After identifying an employee, click the
	ID: 900124058 Rylee Olivia Donovan 🗳 🔍	Approval Category drop down menu to sel the EPAF for One Time Payment – Extra Services (Non Academic Affairs) or One Ti
\rightarrow	Query Date: MM/DD/YYY 11/01/2015	Payment – Extra Services (Academic Affai
	Approval Category: 👔 One Time Payment - Extra Services (Non Academic Affairs), D00007 😭	<u> </u>
	Go	
		The Employee Job Assignments sho
	Employee Job Assignments Type Position Suffix Title Time Sheet Organization Start Date End Date Last Paid Date	all active positions. By clicking the A
		Activ Activ and previous jobs.
	All Jobs	· · · · · · · · · · · · · · · · · · ·

- EPAF Approver Summary | EPAF Originator Summary
- 4. Click on "Go" to begin the One Time Payment Extra Services (Non Academic Affairs) or One Time Payment Extra Services (Academic Affairs) EPAF.

5. Enter the correct position numbers in the format indicated below and click on "GO". If a position number has already been assigned to the employee, select the radial dial at the end of the line and click on "GO". It is very IMPORTANT to use the correct position. If the incorrect position number is used, the EPAF will be returned to you for correction.

Position #:	Suffix #:	Description
000458	00	One-Time Payments – Extra Services paid by Org. 3001.
004010	00	One Time Payments – Extra Services paid to FACULTY by fund 10 monies. The fund #s start with 10.
004011	00	One Time Payments – Extra Services paid to <u>STAFF</u> by fund 10 monies. The fund #s start with 10.
004025	00	One Time Payments – Extra Services paid to FACULTY by other funds (not grants). The fund #s usually start with 108. (Example: 108221)
004026	00	One Time Payments – Extra Services paid to <u>STAFF</u> by other funds (not grants). The fund #s usually start with 108. (Example: 108221)
004030	00	One Time Payments – Extra Services paid to <u>FACULTY</u> by grant funding. The fund #s usually start with "3" (Example: 340231)
004031	00	One Time Payments – Extra Services paid to <u>STAFF</u> by grant funding. The fund #s usually start with "3" (Example: 340231)
000478	00	One Time Payments – Extra Services paid by Continuing Education – Org. 3005
000997	00	One Time Payments – Extra Services paid by Continuing Education - Org. 3017; generally used only by Continuing Education.
001202	00	First Year Seminar

New EPAF Job Selection

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

 ID:
 Rylee Olivia Donovan, 900124058

 Query Date:
 Nov 01, 2015

 Approval Category:
 One time Payment (Extra Serv), D00007

Overload/Add Job, C00006

Search	Туре	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New ob	004026	00	liscellaneous Position Fund 25	41211, Other General Institutional					
										۲
	Primary	000021	00	Assistant Director	4113, Human Resource	Oct 01, 2015			Active	
	Fillinary	000921	00	Assistant Director	4115, Human Resource	00101, 2015			Active	0
All Jo	bs									

Next Approval Type Go

- 6. View Employee Class:
 - o This section allows the originator to view the current employee's employment information.
 - Employment Status must equal (A) Active.
 - o If employment status is listed something else other than Active, do not use this EPAF.
 - o Listed below are the definitions of the Employee Class Code
 - These fields are not able to be changed.

Employee Class Description	Employee Class Definition	Payroll ID
F1, Faculty 9/12	Faculty employee employed for 9 months and paid over 12 months	M1 payroll
F2, Faculty 9/9	Faculty employee employed for 9 months and paid over 9 months	M2 payroll
F4, Faculty 12/12	Faculty employee employed for 12 months and paid over 12 months	M1 payroll
F3, Faculty PT < 9 months	Adjunct faculty	M2 payroll
S1, Full Time Staff	Staff employee employed for 12 months and paid over 12 months	M1 payroll

S2, Part-Time Staff < 9 Months	Staff employee employed for less than 9 months and payment may vary	M2 payroll
S3, Part-Time 9-10 Month Staff	Staff employee appointment over 9-10 months	M1 or M2 payroll
S4, Part-Time 11-12 Month Staff	Staff employee paid over 12 months	M1 payroll
RT, PERS Reemployment of Retiree	Employee retired from the Public Employees' Retirement System	M1 or M2 payroll
ST, Student (WSR, RSE)	Student employee receiving extra compensation for extra duties performed	M2 payroll
GA, Graduate Assistant	Graduate Assistant receiving extra compensation for extra duties performed	M2 payroll
TE, Temporary Employee	Temporary Employee receiving extra compensation for extra duties performed	BW, M1 or M2 payroll

View Employee Employment Class

Item	Current Value	New Value	The Employee Class Code will most of
Employee Class Code: (Not Enterable)	S1, Full Time Staff	─ ←	the time tell you which payroll ID to use from the table above when
Employee Status: 🜟 (Not Enterable)	Active	A	processing an EPAF.

7. Enter Overload Pay Information

Field	Statement/Action	Action/Example
Job Begin Date:	If statement below says "Last Paid Date:"then	Leave field blank
	Overload Spring 2015 - Current FT Faculty/Staff, 000458-00 Overload ENG 10 Last Paid Date: Iay 31, 2014	
	Item Current Value New Value	
	Job Begin Date: MM/DD/YYYY	1
	If there is no current values in the "Current Value" fields,then	Enter:
	Overload/Add Job, 004026-00 Miscellaneous Position Fund 25	(enter corresponding year)
	Item Current Value New Value Job Begin Date: MM/DD/YYY	01/01/2018 or 02/01/2018 or 03/01/2018 MM/01/20
Job Effective Date:	Enter the first day of the month for which the one-time payment – extra services are to be paid	01/01/2018 or 02/01/2018 or 03/01/2018 MM/01/20
Job Personnel Date:	Enter the first day of the month for which the one-time payment – extra services are to be paid. This date should match the "Job Effective Date"	01/01/2018 or 02/01/2018 or 03/01/2018 MM/01/20
Contract Type:	This field defaults to "Overload". Field may be changed to either Primary or Secondary.	
Title:	Enter the description of the one time payment – extra services performed	Example:
	Overload/Add Job, 004026-00 Miscellaneous Position Fund 25	Basketball Ticket Worker
	Item Current Value Job Begin Date: MM/DD/YYYY 11/01/2015	
	Jobs Effective Date: MM/DD/YYYY 11/01/2015 Personnel Date: MM/DD/YYYY 11/01/2015	First Year Seminar Instructor (used pos 001202 00)
	Contract Type: Overload	
	Title: * Basketball Ticket Worker	
Annual Salary:	Total amount to be paid for one time payments – extra services	100.00
FTE:	FTE for one time payments – extra services are generally 0.00	0.00
Employee Class Code	Field is defaulted to S3	
Payroll ID	Payroll ID will default to M2. Field can be change. If the employee class under the "View Employee Employment Class" is S1, S4, F1, or F4, orthen	Use the drop down box to change to M1.

	If the employee class under the "View Employee Employment Class" is S2, F2, F3, ST, GAthen	Payroll ID should ramain defaulted to M2.
	If the employee class under the "View Employee Employment Class" is RT, TE, S3then the payroll ID will be determined based on previous job assignments.	Payroll ID will either be M1 or M2 based on previous job assignments.
Leave Rept Pay ID	The Leave Report Pay ID should match the Payroll ID above.	Match Leave Rept Pay ID to Payroll ID (either M1 or M2)
Job Change Reason	Field cannot be changed. Information is defaulted.	
Step	Field cannot be changed. Information is defaulted.	
Job Status	Field cannot be changed. Information is defaulted.	

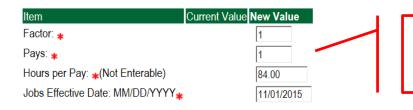
Overload/Add Job, 004026-00 Miscellaneous Position Fund 25

Item	Current Value N	lew Value	
Job Begin Date: MM/DD/YYYY		08/01/2016	
Jobs Effective Date: MM/DD/YYYY		08/01/2016	
Personnel Date: MM/DD/YYYY		08/01/2016	
Contract Type:		Overload v	
Title: *		Basketball Ticket Worker	
Annual Salary: \star		50.00	
FTE: *			
Employee Class Code: *	Q	S3	
Payroll Id: *		M1, Monthly	~
Time Entry Type: (Not Enterable)		Ρ	×
Time Entry Type: (Not Enterable)		N	\sim
Leave Rept Pay ID: *		M1, Monthly	~
Job Change Reason: (Not Enterable))	ONE	\sim
Step: (Not Enterable)		0	2
Job Status: (Not Enterable)		A	

8. Update Factor, Pays, and Hours

Field	Statement/Action	Action/Example
Factor:	The field will default to one. If the payment is to be paid over multiple months, then change the field to represent the number of months to be paid	If the payment will be paid over 2 months, then enter 2 in the "Factor" field.
Pays:	The field will default to one. The field must match the number of pays enter in the "Factor" Field	The Pays number will be 2 if this payment will be paid over 2 months.
Hours per Pay:	Field cannot be changed. Information is defaulted.	None
Job Effective Date:	Enter the first day of the month in which this one-time payment is to be paid	01/01/2018 or 02/01/2018 or 03/01/2018 MM/01/20_

Update Factors, Pays and Hours, 004026-00 Miscellaneous Position Fund 25



Enter the same number in the factor and pays field in which the one time payment is to be paid. Enter the first day of the month in the Jobs Effective Date.

9. Update Default Earnings

g. In the "CURRENT" section – If there is not a date entered under the effective date, then a new effective date will need to be entered under the "NEW VALUE" section.

If a current date is not listed under the "CURRENT" effective date, then enter the first day of	Current Effective Dr.e Earnings Ho	gs, 004026-00 Miscellaneous Posi ours or Units Per Pay Deemed Hours S		End Date	
the month in which the one - time payment will be issued in the "NEW VALUE EFFECTIVE	New Value Effective Date M //DD/YYY	Y Earnings Not Selected	Hours or	Units Per Pay Deemed Hours Special Rate	ShiftEnd Date MM/DD/YYYY Remove
DATE" field. MM/01/20,		Not Selected	•		
EX. 06/01/2017		Not Selected	•		
		Not Selected	T		
	Save and Add New Rows				

- h. Enter the first day of the month in which the one-time payment will be issued in the "NEW VALUE EFFECTIVE DATE" field. MM/01/20_ EXAMPLE: 02/01/2018
- i. Select REG, Regular as the Earnings Code using the drop down box.
- j. Enter **84.00** as the Hours or Units Per Pay.

Update Default Earnings, 004026-00 Miscellaneous Position Fund 25

	Hours or Units Per Pay Deemed	Hours Special Rate S	Shift End Date		
New Value				0	
Effective Date MM/DD/N 11/01/2015	REG, Regular Pay	Hours -	s or Units Per Pay Deemed H	ours Special Rate	Shift End Date MM/DD/YYYY Remove
	Not Selected	•			
	Not Selected	•			
	Not Selected	•			
Save and Add New Rows					

Current	Hours or Units Per Pay					
Effective Date Earnings 07/01/2014 REG, Reg		Deemea Hours Speci	1	(e		
New Value			,			
Rew Value Effective Date MM/DD/Y	YY Earnings	Hours	s or Units Per Pay D	eemed Hours Special Ra	te Shift End Date MM/DD	YYYY Remove
07/01/2014	REG, Regular Pay	•	84.00			
	Not Selected	•			Enter the 1 st d	ay of the month i
	Net Celevited	•				ment is to be paid
	Not Selected				EXAMPLE: 02	/01/2018
	Not Selected	•				
	Not Selected	•				
	Not Selected					

Update Default Earnings, 004030-00 HRSA Nursing, Last Paid Date: Jun 30, 2015

Current									
Effective Dat	e Earnings	Hours or Units I	Per Pay Deemed Hours	Special Rate	Shift End D	ate			
07/01/2014	REG, Regular P	ay	84.00	1					
New Value									
Effective Dat	e MM/DD/YYYY	arnings		Hours or Unit	s Per Pay I	Deemed Hou	rs Special Rate	Shift End Date	MM/DD/YYYY Remove
11/01/2015	F	REG, Regular Pay	•		84.00				
	1	Not Selected	•	[
	١	Not Selected	•	[
	1	Not Selected	•	[
	1	Not Selected	•	[

Defaulting values for Default Earnings from the Job records.
 Save and Add New Rows

9. Terminate Employee Job

Field	Statement/Action	Action/Example
Job Effective Date:	Enter the last day of the month in which the payment is to be paid	11/30/2016
Job Status:	Field cannot be changed. Information is defaulted.	None
Job Change Reason:	Field cannot be changed. Information is defaulted.	None

Terminate Job Only, 004026-00 Miscellaneous Position Fund 25



Enter the last day of the month in which payment is to be paid. MM/31/20__ or MM/30/20__ EXAMPLE: 02/28/2018

10. Labor Distribution – Update if Needed

- a. In the "CURRENT" section the current labor codes and the effective date of the last change will default into the form.
- b. In the "NEW" section add new rows or make changes to the existing rows.
- c. EFFECTIVE DATE: The effective date is the first day of the month in which the payment will be made: MM/01/20_____ EXAMPLE: 02/01/2018
- d. Apply the appropriate changes to the field if necessary.

Steps to change Labor Distributions

1. To remove the default payment information, change the percentage in the "New" Section to 0.00 and click on "Save and Add New Rows". See sample below.

Update Labo Current Effective Date COA Index Fu	: 11/01/2015	,				rcent Encumbrance	• Override E	nd Da	date. This needs	te will default to the query date or today's to be change to the following the first day which the payment is to be paid.	
New Effective Date	: MM/E D/YYY	Y 11/01/2015					\rightarrow		EXAMPLE: 02/07	1/2018	
COA Index	\	Organiza	tion Account		ım Activit	y Location I	Project	Cost	Percent Encumbrance	e Override End Date	
Q 1	Q 1086	01 9 41211	Q 6130	0 🔍 06)5				100.00	Change this percentage to 0.00 and click	
٩ 🗆	Q	Q	Q	Q.	9					on Save and Add New Rows.	
۹ 🗌	Q	٩,	٩, –	Q	Q					on dave and Add New Rows.	
٩ 🗆	Q	Q	Q	Q	9						
٩	Q	٩,	٩,	Q	Q						
								Total:	100.00		
									100.00		
S											
Default from Ir	dex Save a	nd Add New Rows	, —								
Update Labor Current Effective Date: 1	1/01/2015										
COA Index Fund	Organization	Account Progra	m Activity Loo	ation Project	Cost Percent E	ncumbrance Overrid	de End Date				
New											
Effective Date: N	M/DD/YYYY 1	1/01/2015									
COA Index	Fund	Organization		Program	Activity	Location Project	Cost	Percent	Encumbrance Override	End Date	
Q 1	Q 108601	Q 41211	Q 61300	Q 0605	Q			0.00	←		
	9	9	۹.	9	Q						
	9	9	۹.	9	Q						
	9	9	9	9	Q						
۹ 🗌	9	۹.	۹.	9	9						
							Total:	100.0	0		
S											
Default from Inde	K Save and A	dd New Rows									

- 2. Enter the new accounting information. The following must be entered for each line.
 - a. COA = enter 1.
 - b. Fund No.
 - c. Organization No.
 - d. Account No. =
 - i. 61100 = Administrative
 - ii. 61200 = Faculty
 - iii. 61300 = Paraprofessional
 - iv. 61400 = Secretarial/Clerical

- v. 61500 = Technical
- vi. 61600 = Skilled Craft
- vii. 61700 = Service Maintenance
- e. Percentage = totals must equal 100%. See sample below

Click to "Save and Add New Rows"

Update Labor Distributions, 004026-00 Miscellaneous Position Fund 25

Curre												
		1/01/2015										
COA	ndex Fund	Organization	Account Progr	am Activity I	Location Project	t Cost Percer	nt Encumbrance Ove	rride End Dat	e			
New												
	ive Date: M	MM/DD/YYYY 1	1/01/2015									
COA	Index	Fund	Organizatio	n Account	Program	Activity	Location Proje	ct Cost	Percent Encumbranc	e Override End Date F	emove	
Q 1		Q 108601	Q 41211	Q 61300	Q 0605	Q			.00		_	Enter COA, Fund #, Org#, and
												_
Q 1		Q 108522	4021	61300	9	_ Q			100	•		Account# and percentage.
	- i	Q	Q		Q	Q						Be sure percentages = 100%.
		Q	Q	Q	Q	Q						
		Q	Q	Q	Q	- Q				-	•	
1								Total:				
									.00			
D ((L							•			
Deta	ult from Inde	Save and A	dd New Rows									

- 3. Click on the box under the "Remove" Column to remove the old accounting information. The percentage should be set 0.00%.
- 4. Click on Save and Add New Rows. The old accounting information should be removed.

Update Labor D Current Effective Date: 11 COA Index Fund New	/01/2015	,			_	Encumbran	ce Override	End Date	9			the line f	that has Then c	lick on "Sa	
Effective Date: MI	M/DD/YYYY 1	1/01/2015													
COA Index	Fund	Organizatio	n Account	Program	Activity	Location	Project	Cost	Percent E	Encumbrance Overrid	le End D	ate Remove			
۹ 1	Q 108601	Q 41211	Q 61300	Q 0605	٩				.00			(III)			
Q 1	Q 108522	4021	61300	9	9				100						
9		9		Q	Q										
9	9	9	9	9	9										
Q	9	9	Q	9	9										
Default from Index	Save and A	dd New Rows	· <					Total:	.00						

Update Labor Distributions, 004026-00 Miscellaneous Position Fund 25

Effective Date: 11/01/2015

COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New											
Effective D	Date: MI	W/DD/YYYY 11	1/01/2015								
COA In	dex	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date Remove
Q 1		Q 108522	4021	61300	Q 0501	Q				100.00	
		9	9	9	Q	Q					
		9	9	9		Q					
		9	Q	9							
		9		9	9	9					
					Search				Total:	100.00)
Default fro	om Index	Save and A	dd New Rows								

5. Routing Queue

Non Academic Affairs:

- a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- b. All EPAFs must have a Director and Vice President level approval.
- c. Grants One-Time Payment Extra Services, <u>all EPAFS must have a Director, Vice President, Grants, and Grants Budget</u> <u>Office</u>. This can be added to bottom of the queue. Other approval levels will default.

d. EXAMPLE ROUTING QUEUE:

- i. Dept (Director/Supervisor)
- ii. Vice President
- iii. HRFYI Human Resources FYI = Samantha Phillips (SMPHILLIPS)
- iv. Budget = Beverly Lindsey (BLINDSEY)
- v. Payroll = Mary Ruth Phillips (MPHILLIPS)
- vi. HR Director = Lisa Giger (LGIGER)
- vii. Super = Mary Ruth Phillips (MPHILLIPS)

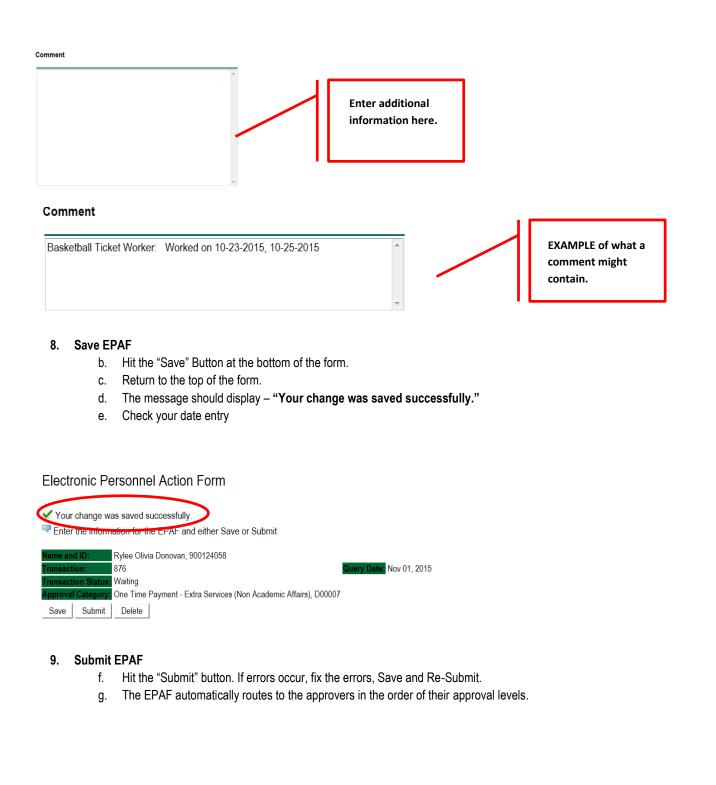
Academic Affairs

- e. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- f. For Academic One-Time Payment Extra Services, all EPAFs must have a Chair and Dean level approval.
- g. For Academic Grants One-Time Payment Extra Services, <u>all EPAFS must have a Chair, Dean, Grants, and Grants</u> <u>Budget Office</u>. Other approval levels will default.
- h. For Academic One-Time Payment Extra Services Continuing Education, add <u>Dean, Graduate and Continuing Education</u> and Continuing Education (Marilyn Read). This can be added to the bottom of the queue.

i. EXAMPLE ROUTING QUEUE:

- i. Chair
- ii. Dean
- iii. Academic Affairs = Cheryl Ballard (CBALLARD)
- iv. Provost = Dr. Charles McAdams (CMCADAMS)
- v. HRFYI Human Resources FYI = Samantha Phillips (SMPHILLIPS)
- vi. Budget = Beverly Lindsey (BLINDSEY)
- vii. Payroll = Mary Ruth Phillips (MPHILLIPS)
- viii. HR Director = Lisa Giger (LGIGER)
- ix. Super = Mary Ruth Phillips (MPHILLIPS)

- 6. Click on the "Save and Add New Rows".
- 7. Comments
 - a. In the "Comments" section, enter comments for the approvers with an explanation for the action. Be sure to include the dates when the extra duties occurred.



Electronic Personnel Act	on Form
The transaction has been success	
Name and ID: Rylee Olivia Donov	ın, 900124058
Transaction: 876 Transaction Status: Pending Approval Category: One Time Payment	Query Date: Nov 01, 2015 - Extra Services (Non Academic Affairs), D00007

Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Errors and Warning Messages		
Туре	Message Type	Description
Add Employee Job	WARNING	*WARNING* This employee is terminated on the Employee Form.
Add Employee Job	WARNING	*WARNING* The Employee's Term Date and Reason should be removed from PEAEMPL.
Add Employee Job	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
Update Factors, Pays and Hours	WARNING	*WARNING* Annual Salary is outside the Table/Grade range.
 indicator a required field 		

* - indicates a required field.

<u>Delete</u>

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and all you to start over.

TERMINATION/RESIGNATION OF EMPLOYEE Accessing the EPAF Menu & Approver Summary

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to terminate an employee's job when they are leaving the University. The steps below should be followed:

- 1. Enter the employee's 900# or click on the \bigcirc magnifying glass to search for an employee's 900#.
- 2. The query date will default to today's date. Change the query date to the effective date of the termination/resignation. For example:
 - If an employee's last physical day at work is January 31, 2018, and personal leave time and/or comp are not being used, then January 31, 2018 will be used as the last day of employment and termination/resignation.
 - If an employee's last physical day at work is January 26, 2018, but plan on using personal leave time and/or comp time until January 31, 2018, then January 31, 2018 will be used as the last day of employment and termination/resignation.
- 3. Select Termination from DSU (Non Academic Affairs) or Termination from DSU (Academic Affairs) from the drop down approval category box.

Non Academic Affairs = <u>any departments that do not report to the Provost</u>, but report to other Vice Presidents/Directors. This EPAF is used for changes to positions in departments that do not report to the Provost.

Academic Affairs = <u>departments that report to the Provost</u>. This EPAF is used for changes to faculty/staff positions in departments/divisions that report directly to the provost.

A LETTER OF RESIGNATION MUST BE SENT TO HUMAN RESOURCES FOR ALL EMPLOYEES VOLUNTARILY RESIGNING.

TERMINATION/RESIGNATION PROCESS FOR INDIVIDUALS WHO ARE CLASSIFIED AS 12 MONTH EMPLOYEES. Use for both Monthly & Bi-Weekly employees

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DAY YOU WANT THE END THE PAY FOR THE EMPLOYEE WHO IS LEAVING AND NOT THE LAST DAY THE EMPLOYEE IS IN THE OFFICE. IF IT IS NOT SET TO THE CORRECT DATE, THE EMPLOYEE WILL EITHER BE PAID TO OR MUCH OR NOT ENOUGH.

New EPAF Person Selection	
Enter an ID, select the link to search for an ID, or generate an ID. Enter the Query Date: MM/DD/ (YYY) 01/31/2018 Approval Category: Tremmation from DSU (Non Academic Affairs), DC Go Employee Job Assignments	After identifying an employee, click the Approval Category drop down menu to select the EPAF for Termination from DSU (Non Academic Affairs) or
Type Position Suffix Title Time Sheet Organization Start Date Primary 000376 00 Grants Coordinator 4113, Human Resource Jan 01, 2017 All Jobs	End Date Last Paid Date Status 7 Active Active 7 Active Assignments show all active positions. By clicking the All Jobs button, it will display all current and previous jobs.

- 4. Click on GO to begin processing the EPAF.
- 5. Click the radial button at the end of the row for the PRIMARY JOB and click GO.

New EPAF Job Selection

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

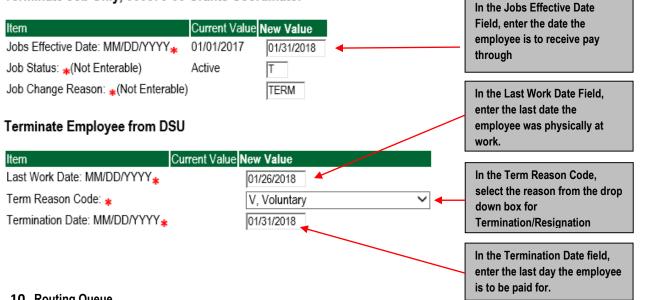
ID: Rylie Ann Clark, 900137172 Query Date: Jan 31, 2018 Approval Category: Termination from DSU NAA, D00010

Terminate Job Only, C00003

	Type New Job		Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select	the radia	primary job and click I button at the end of o select the job and
	Primary	000376	00	Grants Coordinator	4113, Human Resource	Jan 01, 2017			Active	۲	click GC	
All Job Go	os		•							1		

- 6. In the Jobs Effective Date field, enter the date the employee is to receive pay through.
- 7. In the Last Work Date field, enter the last day the employee was physically at work
- 8. In the Term Reason Code field, select the reason for termination/resignation by using the drop down box.
- 9. In the Termination Date field, enter the last day the employee is to receive pay through.

Terminate Job Only, 000376-00 Grants Coordinator



10. Routing Queue

Non Academic Affairs:

- In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- b. All EPAFs must have a Director and Vice President level approval.

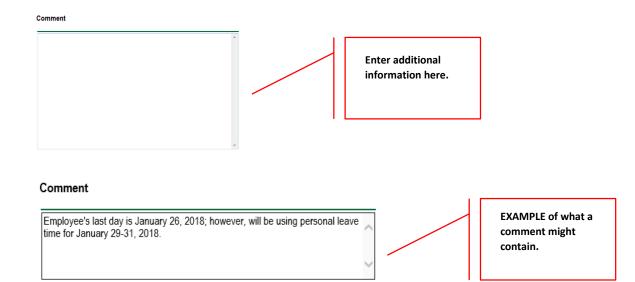
c. Grants Termination from DSU, <u>all EPAFS must have a Director, Vice President, Grants, and Grants Budget Office</u>, This can be added to bottom of the queue. Other approval levels will default.

d. EXAMPLE ROUTING QUEUE:

- x. Dept (Director/Supervisor)
- xi. Vice President
- xii. HRFYI Human Resources FYI = Samantha Phillips (SMPHILLIPS)
- xiii. Budget = Beverly Lindsey (BLINDSEY)
- xiv. Payroll FYI = Mary Ruth Phillips (MPHILLIPS)
- xv. HR2 = Jasmine Cunningham (JCUNNINGHAM)
- xvi. HR Director = Lisa Giger (LGIGER)
- xvii. Super = Mary Ruth Phillips (MPHILLIPS)

Academic Affairs

- a. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- b. For Academic Termination from DSU, all EPAFs must have a Chair and Dean level approval.
- c. For Academic (Grants) Termination from DSU, <u>all EPAFS must have a Chair, Dean, Grants, and Grants Budget Office,</u> Other approval levels will default.
- d. EXAMPLE ROUTING QUEUE:
 - xviii. Chair
 - xix. Dean
 - xx. Academic Affairs = Cheryl Ballard (CBALLARD)
 - xxi. Provost = Dr. Charles McAdams (CMCADAMS)
 - xxii. HRFYI Human Resources FYI = Samantha Phillips (SMPHILLIPS)
 - xxiii. Budget = Beverly Lindsey (BLINDSEY)
 - xxiv. Payroll FYI = Mary Ruth Phillips (MPHILLIPS)
 - xxv. HR2 = Jasmine Cunningham (JCUNNINGHAM)
 - xxvi. HR Director = Lisa Giger (LGIGER)
 - xxvii. Super = Mary Ruth Phillips (MPHILLIPS)
- 11. Click on the "Save and Add New Rows".
- 12. Comments
 - a. In the "Comments" section, enter comments for the approvers with an explanation for the action.



13. Save EPAF

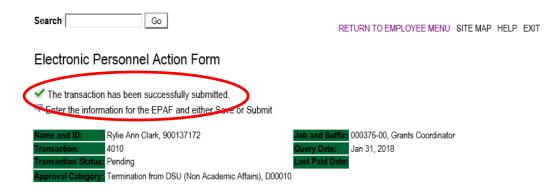
- a. Hit the "Save" Button at the bottom of the form.
- b. Return to the top of the form.
- c. The message should display "Your change was saved successfully."
- d. Check your date entry

Electronic Personnel Action Form

· · ·	as saved successfully. nation for the EPAE and either Save or Submit		
Name and ID:	Rylie Ann Clark, 900137172	Job and Suffix:	000376-00, Grants Coordinator
Transaction:	4009	Query Date:	Jan 31, 2018
Transaction Status:	Waiting	Last Paid Date:	
Approval Category:	Termination from DSU (Non Academic Affairs), D00010)	-
Save Submit	Delete		

14. Submit EPAF

- h. Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
- i. The EPAF automatically routes to the approvers in the order of their approval levels.



Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

<u>Delete</u>

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

TERMINATION/RESIGNATION PROCEDURE FOR INDIVIDUALS WHO ARE 9 MONTH EMPLOYEES

FACULTY EMPLOYEES

1. A faculty member who terminates/resigns at the end of the academic session, then the following dates must be used.

F1 Employee Class: The job effective date will be ended on August 31, 2018; however, the last work date will be May 7, 2018 or the last day of the academic session.

F2 Employee Class: The job effective date will be ended on May 31, 2018; however, the last work date will be May 7, 2018 or the last day of the academic session.

A LETTER OF RESIGNATION MUST BE SENT TO HUMAN RESOURCES FOR ALL EMPLOYEES VOLUNTARILY RESIGNING.

EXAMPLE OF A TERMINATION/RESIGNATION OF AN F1 EMPLOYEE TERMINATION

View Employee Employment Class

Item Employee Class Code: (Not Enterable	Current Value) F1, Faculty 9/	
Employee Status: *(Not Enterable)	Active	A
Terminate Job Only,		
Item	Current Value	New Value
Jobs Effective Date: MM/DD/YYYY	09/01/2015	08/31/2018
Job Status: *(Not Enterable)	Active	Т
Job Change Reason: *(Not Enterable) PROMO	TERM
Terminate Employee from DSU		

Item	Current Value New Value
Last Work Date: MM/DD/YYYY	05/07/2018
Term Reason Code: 😦	V, Voluntary 🗸
Termination Date: MM/DD/YYYY	08/31/2018

EXAMPLE OF A TERMINATION/RESIGNATION OF AN F2 EMPLOYEE TERMINATION

View Employee Employment Class

Active	A	
	Last Paid Date: Jan 31, 2017	1
Current Value	New Value	
09/01/2015	05/31/2018	
Active	Т	
e) RAISE	TERM	
J		
	09/01/2015 Active e) RAISE	Current Value New Value 09/01/2015 05/31/2018 Active T e) RAISE TERM

Item	Current Value New Value	l
Last Work Date: MM/DD/YYYY*	05/07/2018	
Term Reason Code: 🜟	V, Voluntary 🗸	
Termination Date: MM/DD/YYYY	05/31/2018	

UPDATE LABOR DISTRIBUTIONS Accessing the EPAF Menu & Approver Summary

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to change the labor distributions for a position which is already entered in the system. This will mainly apply to employees working on grants where the grant fund number changes annually, or for positions where the source of funding has changed. The steps below should be followed:

- 10. Enter the employee's 900# or click on the \bigcirc magnifying glass to search for an employee's 900#.
- 11. The guery date will default to today's date. Change the guery date to the effective date of the change. For faculty/staff paid monthly, this will usually be the first day of the month in which the change takes effect; for hourly employees on bi-weekly payroll, this will usually be the first day of the next bi-weekly pay period. For some grants, however, this will be another date.
 - EXAMPLE: 09/01/2017 (Monthly) OR 06/16/2017 (BW13) OR 09/29/2017 (Grant start date)
- 12. Select Job Labor Distribution Change (Non Academic Affairs) or Job Labor Distribution Change (Academic Affairs) from the drop down approval category box.

Non Academic Affairs = any departments that do not report to the Provost, but report to other Vice Presidents/Directors. This EPAF is used for changes to positions in departments that do not report to the Provost.

Academic Affairs = departments that report to the Provost. This EPAF is used for changes to faculty/staff positions in departments/divisions that report directly to the provost.

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DAY YOU WANT THE CHANGE TO TAKE PLACE. IF IT IS NOT SET TO THE CORRECT DATE, IT WILL CAUSE AN ERROR AND YOU WILL HAVE TO RESTART THE EPAF.

👎 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.

ID: • 900137172	Rylie Ann Clark	å. O'	
Query Date: MM/DD/			
Approval Category: *	Job Labor Distributi	on Change (Academic Affairs), D00015	~ ←
Go			

After identifying an employee, click the Approval Category drop down menu to select the EPAF for Job Labor Distribution Change (Non Academic Affairs) or Job Labor Distribution Change (Academic Affairs).

Job Assignmen

Active Primary 000376 00 Grants Coordinator 4113, Human Resource Jan 01, 2017 All Jobs

EPAF Approver Summary | EPAF Originator Summary

The Employee Job Assignments show all active positions. By clicking the All Jobs button, it will display all current and previous jobs.

 $^{
earrow}$ Enter or search for a new position number and enter the suffix, or select the link under Title.

 ID:
 Rylie Ann Clark, 900137172

 Query Date:
 Jun 01, 2017

 Approval Category:
 Update Labor Dist NAA, D00016

Update Labor Distributions, C00010

Search	Туре	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
Q	New Job									
		r								۲
	Primary	000376	00	Grants Coordinator	4113, Human Resource	Jan 01, 2017			Active	_
										0
All Jak	- 1			•						·

All Jobs

- 4. Click on "Go" to begin the Job Labor Distribution Change (Non Academic Affairs) or Job Labor Distribution Change (Academic Affairs)
- 5. In the "CURRENT" section the current labor codes and the effective date of the last change will default into the form.
- 6. In the "NEW" section add new rows or make changes to the existing rows.
- EFFECTIVE DATE: The effective date is the first day of the month in which the payment will be made: MM/01/20_____
 EXAMPLE: 06/01/2017

Update Labor Distributions, 000376-00 Grants Coordinator

Effective Date: 01/01/2017 COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override Er 1 10 4113 61300 0605 100.00					The effective date will default to the query date or today's date. This needs to be change to the followin the first day of the month in which the payment is to be paid. EXAMPLE: 02/01/2018						
COA Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	
× 1	Q 10	Q 4113	Q 61300	Q 0605					100.00		-
	_	Q	9	_ Q	_ Q						
ú i i i i i i i i i i i i i i i i i i i	_ <		9	_ <	_ Q	_	_	- i			
	- «j		9	- a	- a	— i	_				
	_ Q		Q	_ Q					-		
,,		,	,	,	,	,	,	Total:	100.00)	

Defaulting values for Labor Distribution from the Job records.
 Default from Index Save and Add New Rows

- 8. Under "New" make any necessary changes to the Fund, Organization, or Account
 - a. COA = enter 1.
 - b. Fund No.
 - i. General university budget funds, Fund 10
 - ii. Other funds (not grants) The fund numbers usually start with "108" (ex. 108221)
 - iii. Grants The fund numbers usually start with "3" (ex. 340231)
 - c. Organization No.
 - d. Account No. =
 - i. 61100 = Administrative
 - ii. 61200 = Faculty
 - iii. 61300 = Paraprofessional
 - iv. 61400 = Secretarial/Clerical
 - v. 61500 = Technical
 - vi. 61600 = Skilled Craft
 - vii. 61700 = Service Maintenance
 - e. Percentage = totals must equal 100%. See sample below

ew ffective	e Date: MN	4/DD/YYYY 06	5/01/2017						Acc	ount# ar	Fund #, Org# nd percentag centages = 10	e.
	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date	Remove
1	(Q 10	Q 4113	Q 61300	Q 0605	٩,			7	75.00		
1	(Q 340231	4113	Q 61300	Q 0605	٩				25.00		
		Q	Q,	٩	٩,	۹ 🛛						
		Q	٩,	9	Q.	٩,						
New Effect	ive Date:	MM/DD/YYYY	06/01/2017									
Effect COA	ive Date: Index	Fund	Organizati		Program	Activity	Locatio	n Project	Co	ost Perc	ent Encumbra Override E Date	
Effect			,	on Account	Program	Activity	Location	n Project	Ca		Override E	
Effect COA		Fund Q 340231	Organizati	Q 61300	Q 0605	 		n Project			Override E Date	ind
Effect COA		Fund (0, 340231 (0, 10) (0, 10	Organizati	Q 61300	Q 0605			n Project			Override E Date	ind
Effect COA		Fund Q 340231	Organizati	Q 61300	Q 0605	 	Location	n Project			Override E Date	ind

9. Click "Save and Add New Rows"

11. Routing Queue

Non Academic Affairs:

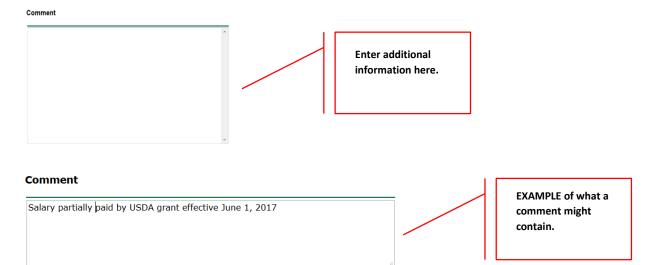
- e. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- f. <u>All EPAFs must have a Director and Vice President level approval.</u>
- g. Grants One-Time Payment Extra Services, <u>all EPAFS must have a Director, Vice President, Grants, and Grants Budget</u> <u>Office</u>. This can be added to bottom of the queue. Other approval levels will default.

h. EXAMPLE ROUTING QUEUE:

- xxviii. Dept (Director/Supervisor)
- xxix. Vice President
- xxx. HRFYI Human Resources FYI = Samantha Phillips (SMPHILLIPS)
- xxxi. Budget = Beverly Lindsey (BLINDSEY)
- xxxii. Payroll = Mary Ruth Phillips (MPHILLIPS)
- xxxiii. HR Director = Lisa Giger (LGIGER)
- xxxiv. Super = Mary Ruth Phillips (MPHILLIPS)

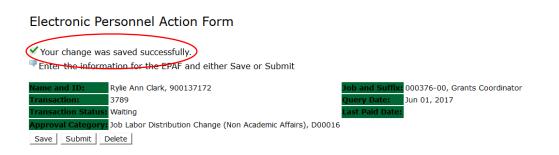
Academic Affairs

- e. In the "Routing Queue" section, enter a User Name for each level of approver. Additional approver levels may be added with a 'Required Action' of 'Approve' or 'FYI' only.
- f. For Academic One-Time Payment Extra Services, all EPAFs must have a Chair and Dean level approval.
- g. For Academic Grants One-Time Payment Extra Services, <u>all EPAFS must have a Chair, Dean, Grants, and Grants</u> <u>Budget Office</u>. Other approval levels will default.
- h. For Academic One-Time Payment Extra Services Continuing Education, add <u>Dean, Graduate and Continuing Education</u> and Continuing Education (Marilyn Read). This can be added to the bottom of the queue.
- i. EXAMPLE ROUTING QUEUE:
 - xxxv. Chair
 - xxxvi. Dean
 - xxxvii. Academic Affairs = Cheryl Ballard (CBALLARD)
 - xxxviii. Provost = Dr. Charles McAdams (CMCADAMS)
 - xxxix. HRFYI Human Resources FYI = Samantha Phillips (SMPHILLIPS)
 - xl. Budget = Beverly Lindsey (BLINDSEY)
 - xli. Payroll = Mary Ruth Phillips (MPHILLIPS)
 - xlii. HR Director = Lisa Giger (LGIGER)
 - xliii. Super = Mary Ruth Phillips (MPHILLIPS)
- 13. Click on the "Save and Add New Rows".
- 14. Comments
 - b. In the "Comments" section, enter comments for the approvers with an explanation for the action.



14. Save EPAF

- e. Hit the "Save" Button at the bottom of the form.
- f. Return to the top of the form.
- g. The message should display "Your change was saved successfully."
- h. Check your date entry



15. Submit EPAF

- j. Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
- k. The EPAF automatically routes to the approvers in the order of their approval levels.

Electronic Personnel Action Form

	action has been successfully submi information for the EPAF and either		
Name and ID	Rylie Ann Clark, 900137172	De	Job and Suffix: 000376-00, Grants Coordinator
Transaction:	3790	Q	Query Date: Jun 01, 2017
Transaction 9	Status: Pending	Li	Last Paid Date:
Approval Cat	egory: Job Labor Distribution Change (Non Academic Affairs), D00016	

Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

Delete

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

CAMPUS ADDRESS CHANGES Accessing the EPAF Menu & Approver Summary

Log into Employee Self Service and choose ELECTRONIC PERSONNEL ACTION FORMS and then NEW EPAF.

This EPAF should be used to change an employee's campus address. The steps below should be followed:

- 1. Enter the employee's 900# or click on the \bigcirc magnifying glass to search for an employee's 900#.
- 2. The query date will default to today's date. Change the query date to the effective date of the change. EXAMPLE: 02/01/2018 OR 02/16/2018 OR 07/09/2018
- 3. Select Campus Address Change (Non Academic Affairs) or Campus Address Change (Academic Affairs) from the drop down approval category box.

Non Academic Affairs = <u>any departments that do not report to the Provost</u>, but report to other Vice Presidents/Directors. This EPAF is used for changes to positions in departments that do not report to the Provost. <u>This EPAF is used for also for Academic Affairs staff</u> <u>positions</u>.

Academic Affairs = <u>departments that report to the Provost</u>. This EPAF is used for campus address changes to <u>FACULTY</u> positions <u>ONLY</u> in departments/divisions that report directly to the provost.

!!! IMPORTANT !!!

MAKE SURE THE QUERY DATE IS SET TO THE DAY YOU WANT TO END THE CURRENT CAMPUS ADDRESS.

For example, an employee is moving to another office location on January 19, 2018. The query date entered will be January 18, 2018, because the "old" campus address will end on January 18, 2018.

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.

Query Date: MM/DD/YYYY	삶 Q, nge (Non Academic Affairs), D00023	Y	After identifying an employee, click the Approval Category drop down menu to select the EPAF for Campus Address Change (Non Academic Affairs) or Campus Address Change (Academic Affairs).
	EPAF /	Approver Summary EPAF Originator Su	mmary
RELEASE: 8.9.0.3		Return to EPAF Menu	The query date entered is the end date of the "old" campus address.
			Click the "GO" link to access the next screen.

- 4. Below is the screen to terminate the current or "old" campus address. The query date entered on the previous screen is the date the campus address will end.
- 5. Check the circle beside the current campus address and click **NEXT APPROVAL TYPE**.

Address Selection

To add a new record, choose New Record. Or, choose the record to be updated under Select.

ID: Rylie Ann Clark, 900137172 Query Date: Jan 18, 2018 Approval Category: Campus Address Change NAA, D00023

Terminate Current Campus Address

Туре	From and To Date	Address	Status	Select		
New Record				0		peside the current s and click NEXT
Campus Address	Jan 01, 2015 to Current Date	DSU Box 3232 Broom 136 Campus	Active	۲	APPROVAL TY	PE.
		Cleveland, Mississippi 38732				
		United States of America				
d						

Address Type defaulted from Electronic Approval Category Form (NTRACAT).

Show All Addresses		
Next Approval Type	<	

6. On the next screen, click on the circle to enter the new campus address.

PERMANENT ADDRESS CHANGES ARE NOT TO MADE THROUGH EPAFS. ONLY HUMAN RESOURCES IS AUTHORIZED TO MAKE A PERMANENT ADDRESS CHANGE.

Address and Telephone Selection

To add a new record, choose New Record. Or, choose the record to be updated under Select.

ID:	Rylie Ann Clark, 900137172
Query Date:	Dec 18, 2017
Approval Category:	Campus Address Change NAA, D00023

Campus Address Add/Change

Go

Туре	From and To Date	Address	Primary Telephone	Status	Select			
New Record					۲	\mathbf{Y}	RECORD and	then click GO.
					0			
Campus Address	Jan 01, 2015 to Current Date	DSU Box 3232 Broom 136	662-8434546	Active				
		Campus			0			
		Cleveland, Mississippi 38732						
		United States of America						
Permanent/Parent	May 16, 2017 to Current Date	123 Anywhere Street		Active				
		Anywhere, Mississippi 38732			0			
		United States of America						
						-		
Show All Address	es							

- 7. Under the section heading, **TERMINATE CURRENT CAMPUS ADDRESS**, enter the date to end the current or "old" campus address.
 - Under the section heading, CAMPUS ADDRESS ADD/CHANGE, enter the effective date of the new campus address in the ADDRESS FROM DATE field.
 - o Address Type: CA will default and cannot be change
 - o Address Sequence No.: Leave Blank
 - Address Line 1: Enter the new campus address in this format. Do not abbreviate the campus addresses.
 - EXAMPLE: DSU Box 3234 Ewing 190

Or if no DSU Box

Kent Wyatt Hall 247

- o Address Line 2: CAMPUS will default, no entry needed
- City: CLEVELAND will default, no entry needed
- o State: MS will default, no entry needed
- o Zip: 38733 will default, no entry needed
- County: 006 will default, no entry needed
- Nation: 157 will default, no entry needed
- o Telephone Type: CA will default, no entry needed
- Area Code: 662 will default, no entry needed
- Telephone Number: Enter the telephone number beginning with the prefix 846. A hypen is not needed
 - EXAMPLE: 8464500

PLEASE SEE EXAMPLE BELOW.

Terminate Current Campus Address



Campus Address Add/Change

Item Current Value	ew Vaiue	
Address From Date: MM/DD/YYYY*	01/19/2018	Enter the offective date of the new compute address in
Address Type: *(Not Enterable)	CA	Enter the effective date of the new campus address in the format below
Address Sequence No .:		the format below
Address Line 1: *	DSU Box 3234 Ewing 190	EXAMPLE: 01/19/2018
Address Line 2: *	CAMPUS	
City: *	CLEVELAND	
State: *(Not Enterable)	MS	
ZIP or Postal Code: *	38733	
County: *	006, Bolivar 🗸	
Nation: *(Not Enterable)	157	
Telephone Type: *(Not Enterable)	CA	
Area Code: *	662	
Telephone Number: *	8464500	

8. Routing Queue

Non Academic Affairs:

In the "Routing Queue" section, Human Resources has been defaulted in for all staff campus address changes. No changes are needed

Routing Queue

Approval Level	User Name		Required Action
90 - (HR) Human Resources		Lisa Weeks Giger	Approve
99 - (SUPER) Superuser		Lisa Weeks Giger	Apply
Not Selected	, Q		Not Selected v
Not Selected	, Q		Not Selected
Not Selected	, Q		Not Selected
Not Selected	, Q		Not Selected V

Save and Add New Rows

Academic Affairs

j. In the "Routing Queue" section, Academic Affairs and Human Resources has been defaulted in for all faculty campus address changes. No changes are needed.

Routing Queue

Approval Level	User Name		Required Action
40 - (ACDAFF) Academic Affairs	CBALLAF	RD Cheryl M Ballard	Approve
90 - (HR) Human Resources		Lisa Weeks Giger	Approve
99 - (SUPER) Superuser		Lisa Weeks Giger	Apply
Not Selected	~ Q		Not Selected
Not Selected	~ Q		Not Selected
Not Selected	~ Q		Not Selected
Not Selected	v Q		Not Selected

Save and Add New Rows

9. Click on the "Save and Add New Rows".

10. Comments

- c. In the "Comments" section, enter comments for the approvers with an explanation for the action.
- d. In the "Comments" section, enter comments for the approvers with an explanation for the action.



11. Save EPAF

- i. Hit the "Save" Button at the bottom of the form.
- j. Return to the top of the form.
- k. The message should display "Your change was saved successfully."
- I. Check your date entry

Electronic Personnel Action Form

Vour change was saved successfully.

Enter the information for the EPAF and either Save or Submit

Name and ID:	Rylie Ann Clark, 900137172	
Transaction:	3969	Query Date: Dec 18, 2017
Transaction Status:	Waiting	Last Paid Date:
Approval Category:	Campus Address Change (Non Academic Affairs), D00023	
Save Submit	Delete	

12. Submit EPAF

- a. Hit the "Submit" button. If errors occur, fix the errors, Save and Re-Submit.
- b. The EPAF automatically routes to the approvers in the order of their approval levels.

Electronic Personnel Action Form

<		has been successfully submitted.	
	Name and ID:	Rylie Ann Clark, 900137172	
	Transaction:	3969	Query Date: Dec 18, 2017
	Transaction Status:	Pending	Last Paid Date:
	Approval Category:	Campus Address Change (Non Academic Affairs), D00023	

Error and Warning Messages

If Errors occur, fix the errors, Save and Re-submit. Error messages will prevent the EPAF from being submitted.

Warnings are acceptable.

<u>Delete</u>

If an EPAF needs to be re-started, click on the "Delete" button. This will delete the transaction and allow you to start over.

EPAF APPROVER Accessing the EPAF Menu & Approver Summary

To approve an EPAF you first must log into Employee Self Services.

Accessing EPAF menu in DSU Online Services

To access the EPAF menu, you must have authorization to initiate and/or approve in DSU Online Services. Once you have the appropriate authorizations, you will need to log on to DSU Online Services.

Accessing Employee Self Service through DSU Online Services

Employee Self Service can be accessed through the DSU website:

- 1. Open your internet browser on your computer.
- 2. Click on myDSU.
- 3. Click on Login under DSU online services.
- 4. Click on Login again to gain access to Employee Self Services.





BUINSTRUCTURE BUINSTRUCTURE Capin More Info Canvas is the University's new learning management system (

Canvas is the University's new learning management system (LMS). All online courses and content will be delivered from Canvas beginning June 2013. For additional resources and assistance with Canvas please visit more information.



5. Enter your 900# and password.

HELP EXIT	
Please enter your User Id	entification Number (ID) and your Password. When finished, select Login.
To protect your privacy, pl	ease Exit and close your browser when you are finished.
Note: If you have forgotter	n your password, enter your User ID(UID), then click "Forgot Password?"
User ID: PIN:	
Login Forgot PIN?	

6. Click on Employee Services.

DSU Online services	
Personal Information Alumni and Friends Student and Financial Aid Employe	e Services
Search Go	SITE MAP HELP EXIT
Welcome, Lisa W. Giger, to the WWW Information System! Last web acce	ess on Oct 14, 2014 at 10.37 am
Student Services & Financial Aid	
Apply for Admission, Register, View your academic records and Financial Aid, Pa	ay on Account, Apply for Graduation.
Employee Services	
View your Benefits and Deductions, Txx Information, Job Summary, and Payroll	Information
Personal Information	
View or update your address(es), phone number(s), e-mail address(es), emerger Customize your directory profile .	ncy contact information, & marital status; View name change & social security number change information; Change your PIN;
National Services 🚽 🖌 🖌 🖌	
View or update interests and activities; Find a classmate; Become a volunteer; U	Jpdate your personal information; Review your pledge history or make a pledge; Customize your directory profile
Return to Homepage	

To approve an EPAF you first go and review the EPAF Approval Summary link. Once at the EPAF menu click on the EPAF Approver Summary link.

Electronic Personnel Action Form

<u>EP</u> A	AF Approver Summary
EP/	F Originator Summary
Nev	<u>v EPAF</u>
EPA	AF Proxy Records
Act	<u>as a Proxy</u>
REL	EASE: 8.9

The EPAF Approver Summary page has three sections: Current, In My Queue, and History Tabs. The "Current Tab" contains EPAFs that either needs to be approved or acknowledged by the Approver. The "In My Queue" Tab contains EPAFs that will be routed to the Approver in the future. The "History Tab" contains EPAFs that an Approver has previously processed.

E	PAF Approver Summary
	rrrent In My Queue History Select the link under Name to access details of the transaction.
Q	ueue Status: All Go Pending

The Current Link:

Displays transactions that with the following statuses:

- **Pending** Transaction is pending approval.
- FYI Transaction is pending acknowledgement.
- More Information Transaction is pending approval but an approver is requesting additional information before they approve it.

To enter the EPAF for any transaction, click on the person's name.

On the "Current Tab" of the EPAF Approver Summary, notice the action column. It has an enterable box that when you click on the box it makes that record selected for approving. In order to approve the EPAF simply click on the save button. To select all of the transaction press the select all button.

Queue Status: All 🔺 Go								
Pending +		New EPAF	Update Proxies Search Proxy or Superuser or Fil	ter Transactions				
			Return to EPAF Menu					
Select All Reset Save								
H 25 of 81 Next ⊕								
ump to Bottom								_
PAF Transactions	♦ ID	▲ Transaction	▲ Type of Change	▲ Submitted Date	▲ Effective Date	▲ Required Actio	Action	L nks
AF Transactions	900114402	▼	A Type of Change		Cct 27, 2014	Approve		L nks
AF Transactions	▼	144	▼	▼	▼	▼ '		
AF Transactions Name Donovan, Rylee C. Donovan, Rylee C.	900114402	144	Campus Address Change (Academic Affairs) Job Labor Distribution Change (Academic	▼ Oct 27, 2014	• Oct 27, 2014	Approve		<u>Comments</u>

The screenshot below illustrates having selected all of the transaction for approval.

Select All Reset Save								
A Name	▲ ID ▼	A Transaction ▼	A Type of Change ▼	A Submitted Date ▼	A Effective Date ▼	A Required Actio	Action	inks
Donovan, Rylee C.	900114402	144	Campus Address Change (Academic Affairs)	Oct 27, 2014	Oct 27, 2014	Approve		omments
<u>Donovan, Rylee C.</u> Assistant Professor of Art, 000003-00	900114402		Job Labor Distribution Change (Academic Affairs)	Oct 27, 2014	Dec 01, 2014	Approve		omments
<u>Donovan, Rylee C.</u> Assistant Professor of Art, 000003-00	900114402	54	Salary and Title Change - Staff (Current Position)	Oct 08, 2014	Sep 01, 2014	Approve	•	omments /arnings
Donovan, Rylee C.	900114402	48	Campus Address Add/Change - Faculty	Oct 07, 2014	Oct 07, 2014	Approve		omments
<u>Giger, Lisa W.</u> Miscellaneous Position-Fund 25, 004025- 0	900325716	111	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Nov 01, 2014	Approve	7	omments /arnings
<u>Giger, Lisa W.</u> HR Workshop III, 004026-00	900325716	110	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Oct 20, 2014	Approve		omments
<u>Gunn, Jesse C.</u> PT Instructor / Gen Acad Instr, 000458-00	900114407	81	Adjunct New Hire	Oct 13, 2014	Oct 13, 2014	Approve	•	Commen /arnings
Hope, Morgan F.	900114408		Terminate Employee Job Only (Academic	Oct 27, 2014	Oct 27, 2014	Approve		omments

Once you save the EPAF you should receive a message indicating that the amount of transactions that were approved. Please make sure that it states that they are processed successfully.

	EPAF Approver Summary
٢	Current In Mv Queue Historv
	Select the link under Name to access details of the transaction.
	Queue Status: All Go

Reviewing Your Work before Approving:

For the purpose of reviewing the detail associated with any of the EPAF, you may click on the name of the individual. The employee's name is underlined in black and indicates that it is a link into the detail information. Notice that is the same as the Comments. Please don't forget to review them especially if there are two asterisks before the word comment (**Comments).

PAF Transactions	A 10	A =		A. D. L. W. J. D. (A 511 11 D 1	A. D	A	Links
Name		▲ Transaction	A Type of Change ▼			▲ Required Action	Action	LINKS
<u>lonovan, Rylee C.</u> Assistant Professor of Art, 000003-00	900114402	54	Salary and Title Change - Staff (Current Position)	Oct 08, 2014	Sep 01, 2014	Approve		<u>Comments</u> <u>Warnings</u>
<u> Donovan, Rylee C.</u>	900114402	48	Campus Address Add/Change - Faculty	Oct 07, 2014	Oct 07, 2014	Approve		Comments
<u>Siger, Lisa W.</u> Miscellaneous Position-Fund 25, 004025- 10		111	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Nov 01, 2014	Approve		<u>Comments</u> <u>Warnings</u>
<u>Siger, Lisa W.</u> HR Workshop III, 004026-00		110	One Time Pay (Overload Faculty/Staff)	Oct 20, 2014	Oct 20, 2014	Approve		Comments
<u>Gunn, Jesse C.</u> PT Instructor / Gen Acad Instr, 000458-00	900114407	81	Adjunct New Hire	Oct 13, 2014	Oct 13, 2014	Approve		<u>**Comment</u> Warnings
<u>łope, Morgan F.</u> Financial Aid Counselor, 000452-00	900114408		Terminate Employee Job Only (Academic Affairs)	Oct 27, 2014	Oct 27, 2014	Approve		Comments
<u>Hope, Morgan F.</u> Financial Aid Counselor, 000452-00	900114408	86	Employee Termination from DSU (Staff/Hourly)	Oct 16, 2014	Oct 16, 2014	Approve		Comments

Once you click on the name link you will see the following:

The Approver has the capability of doing the following for EPAFs that are pending approval:

- Approve To approve a transaction.
- Disapprove To disapprove a transaction.
- Return For Correction To return a transaction to the Originator to make changes. Any transaction that has been returned should have a comment that indicates why it was returned.
- More Info To request additional information from the Originator without returning the transaction for correction. If an
 approver requires more information about a transaction, they should enter a comment that indicates what additional
 information is needed.
- Add Comment To add a comment to the transaction.

Transactions with comments will display as **Comments in the Links section on the EPAF Approver Summary Page.

EPAF Preview
✓ You are acting as an Approver. Name and ID: Rylee Cassandra Donovan, 900114402 Job and Suffix: 000003-00, Assistant Professor of Art Transaction: 54 Query Date: Oct 08, 2014 Transaction Status: Pending Last Paid Date: Approval Category: Salary and Title Change - Staff (Current Position), SALCHS Next ☺
Approve Disapprove Return for Correction More Info Add Comment
Here you can see the routing information used to route this EPAF and what action is still pending to be completed. You can see the comments entered by the originator and who the originator is.
Routing Queue Required Action Queue Status Action Date Approval Level Name Required Action Queue Status Action Date Human Resources, 90 Lisa Weeks Giger, LGIGER Approve Pending Superuser, 99 Lisa Weeks Giger, LGIGER Apply In the Queue
Transaction HistoryActionDateUser NameCreated:Oct 08, 2014 Lisa Weeks GigerSubmitted:Oct 08, 2014 Lisa Weeks Giger
When you Return for Correction, the transaction is removed from your current queue but you can see it in your history tab.
Approval Level Name Required Action Queue Status Action Date Human Resources, 90 Lisa Weeks Giger, LGIGER Approve Pending Superuser, 99 Lisa Weeks Giger, LGIGER Apply In the Queue
Transaction History Action Date User Name Created: Oct 08, 2014 Lisa Weeks Giger Submitted: Oct 08, 2014 Lisa Weeks Giger
Approve Disapprove Return for Correction More Info Add Comment Next Approve Disapprove More Info Add Comment
Next The Return to Top EPAF Approver Summary

In My Queue Link

Displays transactions that with the following statuses:

• In the Queue – Transaction is in the queue of the approver but has not reached the approver's approval level yet.

To enter the EPAF to review the information for any transaction, click on the person's name. The screen shot below shows the current value and the new value. The **new value** column is the column that needs approving.

Enter Change	s	Current V	alue	N	lew Value								
Jobs Effective	Date:	08/15/201	3	0	9/01/2014								
Personnel Da	te: 🖌	08/15/201	3	0	9/01/2014								
Title:		Assistant	Professor	of Art A	ssociate Pr	ofessor of	Art						
Annual Salary	r.	75000		8	0000.00								
FTE:		1		1	.00								
Job Change F	Reason:			F	ROMO								
Effective Dat	und Or	ganization			mActivity	Location	Project	Cost P	ercent	Encun	brand	e Over	ride End
1 1	0 30	06	61200	0101					100.00				
New Effective Dat	le: 10/0	8/2014											
COA Index F			Account	Drogra	mActivity	Location	Project	Coet	ercent	Encun	hrand		ride End
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	0 30	06	61200	0101									

The History Link

Here you can see all the transactions that were processed. The History Link displays transactions with the following statuses:

- **Approved** Transaction that has been an approved by the approver.
- Acknowledged Overridden Transaction that has been approved by a Super User.
- Applied Transaction that has been applied to Banner.
- Disapproved Transaction that has been disapproved by an approver in the approval queue.
- Returned for Correction Transaction that has been returned for the correction to the Originator.
- Void Transaction that has been voided.
- **Removed from Queue** Transaction that has been removed from the queue of the approver.

To enter the EPAF to review the information for any transaction, click on the person's name.

Common EPAF Errors

Below contains a list of common errors received when processing EPAFs. This list of errors is not all encompassing. So, if you should come across an error not listed, please contact Human Resources to assist you with resolving the problem.

New EPAF Job Selection Page

- Invalid Position Error
 - Cause Invalid position number entered.
 - Solution Enter a valid position number. If position number is unknown, perform a position search and select the correct valid position number.

Electronic Personnel Action Form Page

- Missing Required Field
 - Cause Did not enter a required field.
 - Solution Enter the New Value in the field indicated in the error message.

Invalid Date Format

- Cause Date is not in the correct MM/DD/YYYY format.
- Solution Format the date in the MM/DD/YYYY format.

Invalid Value

- Cause Non-numeric value entered into a numeric field.
- Solution Enter a numeric value.

Primary Job

- Cause Contract Type field is set to Primary and the employee already has a primary job.
- Solution Change the Contract Type field to Secondary or Overload based on the instructions for the EPAF you
 are processes.

Missing User ID in Routing Queue

- Cause User ID has not been entered for each Approval Level in the Routing Queue.
- Solution Enter the User ID for the Approval Level where the Approver is missing in the Routing Queue section. Also, the Originator's Default Routing Queue needs to be updated.